CHAPTER 1

INTRODUCTION

1.1 INTRODUCTION AND BACKGROUND OF THE STUDY

My interest in pursuing this area of research was prompted by my observations during the training of teachers on the implementation of the Revised National Curriculum Statement (RNCS). The RNCS was introduced in the quest to improve the quality of the education curriculum. The South African national Department of Education acknowledges that the curriculum plays a part in influencing the quality of education outcomes. Accordingly, the new curriculum was designed to produce a lifelong learner who is independent, literate, numerate, multiskilled, and compassionate, with a respect for the environment and capable of making a meaningful contribution to society. The RNCS builds on the values and vision of both the South African Constitution and Curriculum 2005, which emphasises the acquisition and development of knowledge, skills, attitudes and values (DoE, 2002a).

During these training sessions I pondered on the principles underpinning the new curriculum. I realised that the role of the family is critical in achieving curriculum goals – it is not possible for teachers or schools on their own to accomplish these goals without the support of the family, particularly the parent. In pursuing this point further, I began to ask myself about orphaned[1] learners, particularly those who come from sibling-headed families. *How would such families assist teachers in inculcating and reinforcing the knowledge, skills, values and attitudes espoused by the new curriculum?*

Given that schooling is an extension of the home, the parents may be regarded as the primary educators. Parents have the main responsibility for taking care of the physical, emotional, social, religious and cultural needs of the child, while the school acts as an extension agency to supplement and enrich these experiences. When a child has been orphaned the primary educators

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[1] Studies define an orphan as a child under the age of 15 who has lost his/her mother or both parents (Bennell, Hyde & Swainson (2002); Hepburn (2002); Smart (2003); Skinner et al. (2004:). In this study the definition of an orphan will refer to a child younger than 15 years who has lost one or both parents.

are removed from the equation and the quality of the child's educational experiences becomes impoverished. As Leatham (2005) and Ogina (2008) note in their studies, the school is not able to compensate optimally for the loss of a child's parents and is also not able to provide the primary care needed by the child. The absence of parents in the lives of children may also impact on school work, as the parent(s) is no longer available to supervise homework and to support other educational activities.

1.2 EXPOSITION OF THE PROBLEM

The number of orphaned children is rapidly increasing. Salaam (2004) reports on USAID, UNICEF and UNAIDS estimates in respect of the number of children under the age of 15 who have lost one or both parents to AIDS in Africa. It is estimated that, at the end of 2001, there were 13.4 million orphaned children in Africa with the majority (82%) in sub-Saharan Africa. It is expected that, by 2010, more than 20 million children will be orphans (UNESCO, 2004a). In addition, it is predicted that, owing to the 10-year time lag between HIV infection and full-blown AIDS, the number of orphaned children in Africa will continue to rise even after the rate of HIV has begun to decline. In Uganda, for example, although the epidemic appears to be declining, the number of orphans under the age of 15 continued to rise for 10 years after the infection had peaked.

Louw (2003:12) projects that, if sexual behaviour or health interventions do not change, then, by 2015, 2.7 million South African children[2] under the age of 18 will have lost a mother as a result of the pandemic and, if this figure were to be expanded to include those children who had lost one or both parents to any cause of death, the number of orphans would increase to 5.67 million by 2015.

Dorrington, Bradshow and Budlender (2002) estimate that, in July 2002, there were 885 000 orphans under the age of 18 in South Africa. It is assumed that, of this overall number, 38% may have been orphaned as a result of AIDS. These authors state that, in Mpumalanga and KwaZulu-Natal, almost half of all maternal orphans were orphaned as a result of AIDS. In all nine provinces, except the Western Cape, more than half of all orphans are as a result of AIDS. It is

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[2] According to the Children's Act (No. 38 of 2005), a child is defined as a person under the age of 18 years. The learners in my study fit this definition because they are all under the age of 18. Furthermore, it is against the backdrop of this definition that I chose to use the term 'sibling' to describe the older sisters aged 19 and 23 who are taking care of the children in this study.

estimated that the number of maternal AIDS orphans under the age of 15 will peak in 2015 at roughly two million, while that of paternal AIDS orphans under age 18 is expected to peak at 4.7 million in 2015. The total number of children who will have lost one or both parents to AIDS will be approximately 5.7 million by 2014 (Garbus 2003:57). Cornia (2000:12) predicts that, by 2015, AIDS orphans will constitute between 9 and 12% of the total population of South Africa.

This increase in the number of orphans affects family structures. Family forms are altering – often with profound effects on the learning experiences of orphaned children. Changes are taking place in the care-giving arrangements of affected children with an increasing proportion of orphans being taken care of by the elderly and by relatives (Foster *et al*.1997). Furthermore, there is an emerging phenomenon of child-and adolescent-headed families (Desmond et al. 2003; Brookes, Shisana & Richter 2004; Foster *et al*. 1997, Leatham 2005). Lombe & Ochumbo (2008:685) point out that a growing number of orphaned children, as young as 11 years old, are having to establish their own households while an increasing number of children in South Africa are being left without parents to meet their basic needs and provide them with emotional care and support. In view of the fact that the extended family is no longer able to take care of orphans as a result of social and economic constraints, older siblings are having to become the caregivers of their younger brothers and sisters (Leatham, 2005).

Apart from the changes in the structure of families, studies in this field show that there is an increase in the number of orphans in Africa who have either witnessed or, in some cases, taken care of their parents with terminal illnesses, often in conditions of extreme poverty and neglect (Foster 2002:502). Accordingly, these studies also show an increase in the number of orphans who are grieving the loss of parents (Ogina, 2008), orphans who are experiencing various emotions such as sadness, pain, uncertainty, and fear (Leatham, 2005), and children who have been separated from their siblings (Sengendo & Nambi 1997).

The issue of the increasing numbers of orphaned learners who are being taken care of by adults other than their parents or primary school orphans who are heading households is a highly relevant topic, as governments strive not only to provide universal primary education for all, but also commit to quality education for all. Goal number six of the Dakar Framework for Action and Millennium Development refers to the addressing of all aspects of the quality of education so that recognised and measurable learning outcomes may be achieved by all, especially in literacy, numeracy and essential life skills (UNESCO 2000:17). The Dakar framework recognises quality

of education as a fundamental determinant of whether Education for All (EFA) has been achieved (UNESCO 2004a: 29); while the framework has declared that, by 2015, *all* children of primary school age (including orphaned learners) will be able to participate in free schooling of an acceptable quality (UNESCO 2002:29). According to the Dakar Framework for Action, improving and sustaining the quality of basic education is important in ensuring effective learning outcomes.

South Africa is a signatory both to the Dakar Framework for Action of 2000 and to a number of other international agreements in terms of which the country has committed itself to combating poverty through the provision of compulsory basic education that is of good quality and in respect of which financial capacity will not constitute a barrier to access for any child.

> Our objective goes beyond free education for the poor. We seek, through this plan, to achieve a schooling system that is *free and of a good quality* for all poor in the country (DoE 2003a :5).

South Africa, in response to the global imperatives of EFA, has initiated policies and legislative frameworks designed to improve the overall education quality in South African schools. The following policy documents provide a framework for the conceptualisations of intended quality in education**:** the White Paper on Education and Training of 1995; the South African Schools Act 84 of 1996; the National Norms and Standards for School Funding policy of 1998; the National Norms and Standards for Educators of 2000; the Education White Paper 6: Building an Inclusive Education and Training System of 2001; the Revised National Curriculum Statement Grades R–9 of 2002; the National Policy on Whole-School Evaluation of 2002; the Amended National Norms and Standards for School Funding of 2006; and the National Policy for an Equitable Provision of an Enabling School Physical Teaching and Learning Environment of 2008. These will be discussed in detail in the next chapter.

In view of the increase in the number of orphaned children and the government's commitment to achieving quality education, I argue that the issue of orphanhood is presenting a challenge to the education system. Orphanhood may be impacting either on the very inputs, processes and outputs referred to in the various policies or on the government's commitment to improving the quality of schooling to the poorest learners as stated, for example, in the Amended National Norms and Standards for School Funding of 2006.

Schooling is an extension of the home where the primary educators are the parents. Parents have the main task of taking care of the physical, emotional, social, religious and cultural needs of the child (Maton & Hrabowski III & Greif 1998; Desmond, Richter, Makiwane & Amoateng. 2003). Furthermore, parental involvement in their children's schooling contributes to positive learner outcomes, including higher academic achievement, improved school attendance, positive attitudes, improved self-concept, increased cooperative behaviour, enhanced school retention and lower drop-out rates (Epstein 1985; Stevenson & Baker 1987; Bradley, Caldwell & Rock 1988; Grolnick & Slowiaczek 1994; Balli, Demo & Wedman 1998). This suggests that, when the primary educators are taken out of the equation, the quality of the educational experiences of orphaned learners will become impoverished. These learners will not experience education of an equivalent quality to those learners who have not been orphaned. In part, this may be attributed to the fact that schools are not able to compensate optimally for the loss of a child's parents and are also not able to provide the primary care needed by the child. This could also impact on the child's school work, as there is no longer a parent available to supervise the child's homework and other educational activities.

Research conducted on the relationship between orphanhood and education (Ainsworth & Filmer 2002; Bennell, Hyde & Swainson 2002; Giese et al. 2003; Schierhout 2005) has focused mainly on the relationship between illness/death and school enrolments and drop-out rates. In other words, such research has focused on orphanhood and access to education. My study goes beyond access in that it explores the relationship between orphanhood and quality education. As indicated by Article 33 of the Dakar Framework for Action (UNESCO 2000:16) – "while commitment to attaining universal enrolment is essential, improving and sustaining the quality of basic education is equally important in ensuring effective learning outcomes".

My study was aimed at exploring the lived experiences of orphaned African children in order to establish the way in which these experiences affect their education and, by extension, the quality of the education they receive. The lived experiences of these children were studied from a sociocultural perspective that served as a lens through which quality education was identified and explored. When the education system is faced with a new challenge, it is not possible to ignore the influence of the family's cultural socialisation and the transference of beliefs and values.

This study also afforded orphaned African primary school learners living in a township the opportunity to tell their stories so that a deeper sense of understanding may result. From their stories it is possible to infer the type of educational experiences they have undergone, which will shed light on the quality of education received. Graham (2007) asserts that, although the importance of children's experiences has been recognised within research and the schooling context, research conducted in South Africa has often neglected the voices of black children and their lived experiences in families and in schools. Other researchers have also noted the neglect of black children in mainstream research and state that little or no attention has been paid to their lived experiences in families and schools (Bernard 2002; Graham 2007). There has been little research carried out that explains the way in which African children bring meaning to their experiences (Bernard, 2002). Graham (2007) challenges the silencing and marginalisation of black children in the wider society and the limited qualitative studies documenting black children's views.

1.3 PURPOSE OF THE STUDY AND THE RESEARCH QUESTIONS

The purpose of this study is to explore the lived experiences of African orphaned learners in relation to their educational experiences with the aim of exploring whether the type of education received and the inferred quality thereof correlates with official conceptions of quality education as articulated in government policies.

1.3.1 Research questions

The central research question guiding this study may be formulated as follows: *What is the possible relationship between the intended official policy on the provision of quality education and the type of education experienced by orphaned learners?* In order to explore this central question fully the following sub-questions will also be explored:

>   1.3.1.1 What are the lived experiences of orphaned learners in relation to schooling?
>   1.3.1.2 How do orphaned children's lived experiences at home and at school impact on their schooling experience?
>   1.3.1.3 What possible indicators of the quality of education received may be inferred from lived experiences?

1.4 STUDY CONTEXT

This case study on the lived experiences of orphaned learners was conducted in a single school which is situated in an informal settlement[3] in the province of Gauteng. The school selected for this study was founded in 2000. Prior to the establishment of the school children in the informal settlement had to travel long distances to schools outside the area. Community leaders and other interest groups engaged the Provincial Department of Education to build a school for the community. As a result, the school caters mainly for learners from the informal settlement. From the background information obtained on the school it would seem that, in the past, many of the learners (both orphaned and those with parents) arrived at school hungry. Accordingly, the school decided to plant a vegetable garden to help feed the hungry, the poor as well as the orphaned. The Department of Correctional Services, together with parents, teachers and learners, worked on this project. The inception of a feeding scheme in the school led to a decrease in learner absenteeism – by September 2001 the rate of learner absenteeism had dropped from 47% to 3%. The school continued to supplement the national school feeding scheme with vegetables from the school garden. At the time of the study the school was providing meals for 945 of the 1 434 learners each day (Undated document on the history of the school). It is important to note that most of these learners come from homes in which one or both parents are still alive. The children in the school (orphaned and other) are, therefore, largely equalised in terms of poverty and their basic needs. This helped create an effective case study for focusing on the quality of the educational experiences of orphans in poverty-stricken circumstances.

The study presents the narratives of four primary school orphaned learners who live either with relatives or else in sibling-headed households. The participants come from socioeconomically disadvantaged backgrounds, which are characterised by a shortage of food, poor housing conditions, and reliance on social grants from the government. In view of the fact that it is not possible to separate the lived experiences of these learners from their sociocultural context, it is

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[3] Informal settlements (often referred to as squatter settlements) refer to dense settlements comprising communities housed in self-constructed shelters under conditions of informal or traditional land tenure. Such settlements are common features of developing countries and are, typically, the product of an urgent need for shelter on the part of the urban poor. As such, they are characterised by makeshift shelters built from diverse materials (downloaded from *www.sli.unimelb.edu.au/informal/inform_set.html*).

important to understand the African family structure and the African cultural belief system (cf Chapter 3).

1.5 CONCEPTUALISATION OF QUALITY EDUCATION

Depending on the way in which the term is conceptualised, there are different meanings which may be ascribed to the concept of quality education (UNICEF 2000; Adams 1993). Determining the quality of an education system is often associated with the measuring of certain specified indicators. For example, the National Policy of Whole School Evaluation (DoE, 2002b) uses a set of indicators to describe what it perceives as quality in education (i.e. official conceptualisation). Furthermore, based on the inputs and processes, the policy stipulates future outcomes, namely, academic achievement, standards of behaviour and rates of punctuality and attendance. This approach to the study of educational quality is based on a particular philosophical tradition that presupposes a relationship between educational processes linking inputs to future outcomes (Ginsburg & Adams 1997). However, Myers (2004) contends that such conceptions fail to recognise that there are many factors and multiple environments which influence outcomes.

In view of the considerable variations in living conditions across communities, as well as the different contexts within which education is provided, universal definitions of quality are not possible (Dahlberg, Moss & Pence 1999:104). Pigozzi (2008) contends that the unevenness of quality is a critical issue facing education systems in that, even in the same classroom, boys and girls may have significantly different learning experiences. Likewise, in the same classroom, orphaned and non-orphaned learners may have varied learning experiences which may impact on the intended quality.

Furthermore, although definitions of quality education which include components such as teacher competence, relevant content, and effective management and administration remain essential, there is a need to look at new ways of approaching quality in education. There is a need also to address the social and other dimensions of learning (Pigozzi 2008). According to UNESCO (2004b:4) quality education focuses on the following aspects:

- Quality education should reflect learning in relation to the learner as an individual, a family and a community member, and as part of a world society.
- Quality education welcomes the learner and may adapt to meet learning needs.

- Quality education acknowledges the diversity of experiences reflecting the learner's prior and current situation, as well as characteristics and skills that the learner brings to the learning environment.

These experiences, characteristics and skills may present barriers, as well as opportunities, in respect of the way in which the learners learn, in that these experiences, characteristics and skills all determine the way in which a learner may learn, behave in class, interact with other learners and the teacher and also the way in which the learner may interpret the knowledge presented (Pigozzi 2008, UNESCO 2004b).

Departing from the premise that quality education focuses on learning (UNESCO 2004b), my assumption is that the received quality should be determined by what is experienced within the context in which learning takes place (i.e. the home and the school). This assumption necessitated an exploration of the lived experiences of African orphaned learners within the two learning environments of the school and the home in order to infer from their constructions the meaning of the concept of quality. This involved interpreting their constructions, presenting the deconstructed forms of their realities as findings and determining, from the findings, possible indicators of received quality. This conceptualisation of quality may be graphically described as follows:
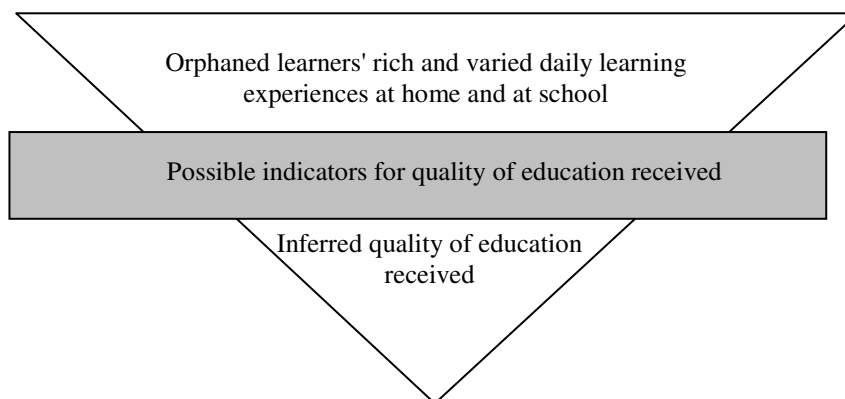
Figure A: Conceptualising Education Quality

Approaching the meaning of quality education from this angle entailed the adoption of a different way of understanding the world – a constructivist perspective of reality. In accordance with this perspective, both the world and knowledge of the world are socially constructed. Social construction is a social process and it does not exist apart from the participants' involvement in

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the world (Moss, Dahlberg & Pence 2000:109). Furthermore, Woodhead & Keynes (1996) and Moss & Pence (1994) argue that quality should be seen in terms of socially constructed needs that are both culturally relative and situation-specific. This suggests the understanding of quality education from the sociocultural traditions of African learners.

In conclusion, I contend that notions of quality education should be sought that satisfy basic learning needs, and enrich the lives of learners and their overall experience of living (UNESCO 2004b:17). A study of the lived experiences of orphaned learners should, thus, provide rich evidence of whether their learning needs have, indeed, been satisfied, their lives enriched and their overall experience of living enhanced. In other words, I am advocating conceptualisations of quality that "seek out" learners' experience of that which they receive.

1.6 NARRATIVE RESEARCH

In terms of examining the constructed knowledge in relation to lived experiences, the narrative research methodology appeared well suited for producing insights into the experiences and personal constructions of orphaned learners. It was feasible that, working with the qualitative methodology of narrative research, with both its reliance on the individually constructed conception of reality (Lincoln & Guba 1985) and its acceptance of the "personal context" (Yin 1994:8), could produce "thick descriptions" (Gertz cited in Lincoln & Guba 1985:125) of the personal experiences of African orphaned learners.

Furthermore, Lieblich, Tuval-Mashaich & Zilber (1998:7) argue that the verbal accounts and stories presented by individual narrators and the reality they experience allow for an understanding of their inner worlds. In view of the fact that the learners in this study are living the reality of orphanhood, it follows that their experiences, both past and present, will be embedded in the narrative language of their stories – their previous life with parents, life with a sick/dying parent, life after the death of parents. Clandinin & Connelly (2000:19) contend that narrative researchers are concerned with life as it is experienced on a continuum – experiences that are contextualised over a reasonably long period.

In addition, each individual narration is affected by the context within which it is narrated. The narrations also carry cultural meanings (Lieblich *et al.*1998:9). Culture, according to Njoh (2006:1), refers to the knowledge, beliefs, customs, morals, tradition and habits of a people. Over

and above their personal experiences, individuals construct their narratives from the building blocks which are available in their common culture. The study and interpretation of narratives enable the researcher to access both the narrator's culture and social world (Lieblich *et al.* 1998:9). The sociocultural aspect of narratives was important in my study because I perceived the African orphaned learners' constructions of their lived experiences as being shaped by their sociocultural contexts, which, in turn, suggests that understandings of the quality of education may be embedded in the sociocultural experiences of the African learner.

Empirical data is central to a narrative inquiry (Connelly & Clandinin 1990:5). The data in this study refer to both the oral and written narratives which were collected from learners, educators and guardians (grandmothers, uncles and older family siblings) in the form of interviews, written stories and field notes. Field notes, which are collected through observation, constitute one of the primary tools of narrative inquiry work (Connelly & Clandinin 1990:5).

In this study I initially collected and analysed the narratives of seventeen orphaned learners. The main categories which emerged from the data revealed that the learners were being taken care of by grandparents, uncles, stepmothers or older siblings. Of these seventeen learners, I selected *four* for a longer-term involvement, which took the form of a series of interviews with them, their guardians and their teachers with the aim of saturating the data. The four learners came from households which were headed by either a grandmother, an uncle and or else a sibling. These four learners constituted the main source of data from which their lived experiences in terms of education was reconstructed. Where necessary, additional data were integrated from the stories of the other thirteen learners.

1.7 ESTABLISHING THE TRUSTWORTHINESS OF THE STUDY

As indicated before, this study is based on philosophical assumptions that view reality as being socially constructed. These assumptions are related to the ways in which I, as a qualitative researcher, perceive the concepts of validity and reliability. In common with other qualitative methods, the narrative method relies on criteria other than validity, reliability and generalisability (Connelly & Clandinin 1990:7)**.** Lincoln & Guba (1985) propose concepts such as credibility, dependability, transferability and confirmability, which better fit the qualitative philosophical assumptions.

In order to enhance the credibility of the findings which emerge, Davis (1992) and Silverman (2001) point out that qualitative researchers triangulate by using multiple and different sources, methods, investigators and theories. In this study I used various methods of data collection, which took the form of the learners' written narrations; interviews with learners, teachers and caregivers and field notes. I requested the learners to write about themselves, their families and an incident in their lives which they wished to share with me. My interviews with these learners were based on what they revealed in their written stories which, in turn, allowed me to explore themes and story lines.

Another way in which I enhanced the credibility of my study was by adhering to what Silverman (2001) terms low-inference descriptors which are incorporated into this research. Silverman (2001:230) points out that, in the case of interviews, low-inference descriptors could be accounted for by tape-recording all face-to-face interviews, carefully transcribing these tapes yourself as the interviewer and not entrusting the task to an audio-typist and presenting long extracts of data in the research report – including the specific question that had proved the answer.

The qualitative researcher is expected to provide "thick descriptions" of the study with sufficient detail to allow the reader to determine whether it is possible to consider transferability of the research findings to other contexts (Lincoln & Guba 1985; Silverman 2001). Gillham (2000) argues that providing multiple forms of evidence in sufficient detail not only provides a thick description which, in turn, improves the understanding of the phenomenon, but that it also enhances the credibility and dependability of the evidence. I have provided the reader with a detailed description of the context of the study, the way in which participants were selected and the strategies used to collect and analyse the data (cf. Chapter 4). LeCompte & Goetz (1982:36) caution that failure on the part of the researcher to specify exactly how the research was carried out may create serious problems in terms of credibility.

In qualitative research the researcher attempts to ensure that the findings are both dependable and confirmable. The issue is not whether the findings are replicable but whether the results are consistent with the data collected (Merriam 1998:206). Merriam (1998) suggest techniques such as providing an audit trail in order to enhance the dependability of the findings. Merriam (ibid :207) points out that, in order for an audit to take place, the researcher must describe in detail the way in which the data were collected, how the categories were derived and the decision-making process used throughout the inquiry. This description is presented in chapter 4 of the study.

1.8 ETHICAL CONSIDERATIONS

Research involving children poses major ethical questions. This is particularly true when orphaned (vulnerable) children are involved because the absence of parents may render these children susceptible to exploitation. It was essential that I ensured that I adhered to the prescriptions of research ethics, such as informed consent, voluntary participation, confidentiality and privacy.

Berg (1995:205) states that among the most serious ethical concerns is the assurance that the involvement of participants is voluntary and that the participants are informed about the research. Participants should not be forced, even in a subtle way, to participate in the research. At my first meeting with the learners I first sought oral assent from the children themselves. I explained the purpose of the research and gave the learners the opportunity to indicate whether or not they would like to participate in the study. In view of the fact that all the children in this study were under the age of 18, I gave each learner who had agreed to participate in the study a consent form for their guardians to sign. This form was signed by both the guardians and myself. One of the reasons behind the requirement to obtain signed, informed consent forms is that these forms systematically ensure that potential participants are participating knowingly in the study and that they are doing so voluntarily (Berg 1995:212). The educators and guardians of the learners who participated in this study all signed a consent form before participation in the study commenced. Further consent was obtained to record the interviews with the learners, the educators and the guardians.

As a researcher my responsibility towards the participants does not cease when all permissions have been granted and consent forms signed, but, rather, it continues throughout the study (Greig & Taylor 1999:155). During the interviews I explained to the learners that I would ensure that the information which they shared with me would not be divulged to anyone and that, for purposes of anonymity and confidentiality, their names would be changed to pseudonyms when the data were reported. I requested their permission to use the tape recorder and I allowed them to listen to the tape recordings of the interviews, which I played back to them immediately after each interview.

1.9 DELIMITATION OF THE STUDY

The aim of my study was to explore and interpret the educational experiences of orphaned learners in the particular context of the study. It may be possible that the stories related in my study reflect the stories of other orphaned learners in similar contexts. The study may be "generalisable to theoretical proposition" (Yin 1994:100) but not to all orphans and to all schools. If this study were to be replicated in other settings and using other samples it would build a more comprehensive picture of the effects of orphanhood in terms of the education system.

Seen in a broader perspective, this qualitative case study has the potential to be of great value as it provides a picture of the impact of orphanhood on the educational experiences of learners and the way in which these experiences affect the quality education that South Africa's policies aim to achieve. In particular, this study will extend the knowledge base through an understanding of quality education by providing new empirical evidence through the use of a diverse combination of methodological approaches in respect of data collection.

Furthermore, the study did not aim at presenting a critical review of the policies discussed, nevertheless, I was interested in the way in which quality education is described in these policies.

1.10 OVERVIEW OF CHAPTERS

Chapter 1 presents an overview of the study by describing both the background of the study and the research questions, and providing both an exposition of the problem and a brief discussion of the concept of "quality education". It also presents the theoretical premises and assumptions on which the study is based, and, in this way, makes possible a brief exposition of the research design, thus enhancing the trustworthiness of the study and the ethical considerations, particularly when dealing with children. The chapter concludes with an overview of the subsequent chapters.

Chapter 2 presents a discussion on South African policies and legislative frameworks geared towards the attainment of quality education in South African schools, international perspectives on quality education and the theoretical approaches to quality in education. Hopefully, this discussion will help the reader to understand the theoretical assumptions that underpin the policies discussed in the study and the theoretical assumptions which guided the description of education quality.

Chapter 3 presents an exploration of sociocultural theory guiding this study. The African view of life is discussed in relation to cultural beliefs, values and traditions in order to understand the way in which quality education may be conceptualised from this sociocultural background.

Chapter 4 describes the research design and methodological issues involved in designing the study, choosing the research site, sampling, data analysis strategy and how I enhanced the quality of the study

Chapter 5 explores the lived experiences of orphaned learners in relation to their schooling. Data that were derived from written texts provided by the learners and interviews with these learners were supplemented by interviews with teachers and guardians. The emerging themes are identified and reported on.

Chapter 6 discusses the findings which emerged from Chapter 5 in relation to conceptualisations of quality education as set out in the policies discussed in Chapter 2. Integrated into the discussion are conceptions of quality education which resonate with the situation in which orphaned learners experience schooling. The chapter ends with suggestions for further research and the overall conclusion.

1.11 CONCLUSION

Parents are responsible for the care, development and education of their children in the academic, social and cultural field. In view of the critical role played by parents, the absence of parents in the lives of orphaned learners impacts on the educational experiences of these learners and, subsequently, on the intended quality education espoused in the various policies discussed in this study. Accordingly, this study sought to discover new descriptions of quality education in the lived experiences of these learners.

CHAPTER 2

QUALITY EDUCATION POLICIES AND CONCEPTUALISATIONS OF QUALITY IN EDUCATION

2.1 INTRODUCTION

The goal of achieving universal, free and compulsory primary education for all children has been on the international agenda since the Universal Declaration of Human Rights was affirmed in 1948 and is mentioned in various international treaties and declarations. However, most of these declarations and commitments are silent on the quality of education to be provided in order to meet this objective. It was only in 1990, when states adopted a World Declaration on Education for All (EFA), that quality was identified as a prerequisite for achieving the goal of equity. In 2000, the Dakar Framework for Action reaffirmed the commitment to quality education by recognising that "quality education is the main determinant of whether EFA is achieved" (UNESCO 2004a:29).

In response to the global imperatives of EFA and the political necessity for societal transformation, South Africa has embarked on a process of developing new policies and a legislative framework in the field of education with a view to transforming education in such a way that the ideal of quality education for all can become a reality. The following documents, which form the basis of my study, were selected from a myriad of policies: White Paper on Education and Training (1995); South African Schools Act 84 of 1996; National Norms and Standards for School Funding policy (1998), Amended National Norms and Standards for School Funding (2006); Revised National Curriculum Statement Grades R–9 (2002); National Policy on Whole School Evaluation (2002); Education White Paper 6: Building an Inclusive Education and Training System (2001); National Norms and Standards for Educators (2000); and the National Policy for an Equitable Provision of an Enabling School Physical Teaching and Learning Environment (2008).

2.2 QUALITY EDUCATION: THE POLICY CONTEXT

In this section I explore the different conceptualisations of education quality with a view to understanding the way in which quality in education is conceptualised in the South African policy and legislative context, with particular emphasis on the intention to realise quality education in South Africa's education system.

2.2.1 International declarations on the quality of basic education

The Dakar Framework of Action (UNESCO 2000:17) affirms "that quality is at the heart of education, and what takes place in classrooms and other learning environments is fundamentally important to the future well-being of children, young people and adults". Article 42 of the Expanded Commentary on the Dakar Framework of Action defines quality education as education that satisfies basic learning needs, and enriches the lives of learners and their overall experience of living (ibid).

Quality education that satisfies basic learning needs, and enriches the lives of learners and their overall experience of living entails having

- healthy, well-nourished and motivated learners
- well-trained teachers and active learning techniques
- adequate facilities and learning materials
- a relevant curriculum that can be taught and learned in a local language and that builds on the knowledge and experience of the teachers and learners
- an environment that not only encourages learning but is welcoming, gender-sensitive, healthy and safe
- a clear definition and accurate assessment of learning outcomes, including knowledge, skills, attitudes and values
- participatory governance and management
- respect for and engagement with local communities and cultures

Similarly, UNICEF (2000:4) acknowledges the many definitions of the concept of quality in education; however, it maintains that there is consensus on five basic dimensions of quality education:

- Learners who are healthy, well nourished, and ready to participate and learn, and supported in learning by their families and communities
- Environments that are healthy, safe, protective and gender sensitive, and provide adequate resources and facilities
- Content that is reflected in relevant curricula and materials for the acquisition of basic skills, especially in the areas of literacy, numeracy and life skills, and knowledge in such areas as gender, health nutrition, HIV/AIDS prevention, and peace
- Processes through which trained teachers use child-centred teaching approaches in well-managed classrooms and schools and skilful assessment to facilitate learning and reduce disparities
- Outcomes that encompass knowledge, skills and attitudes, and are linked to national goals for education and positive participation in society (ibid)

UNESCO (2004b) proposes a framework for understanding quality education in the context of HIV and AIDS. Since quality education focuses on learning, the framework looks at factors affecting learning at two levels – at the level of the learner in his or her learning environment (formal or non-formal) and at the level of the system that creates and supports the learning experience.

Quality education at the level of the learner

Seeks out learners – from households affected by HIV and AIDS in creative ways, working with them, their families and communities to support learning and fulfil the right to education. These learners have less access to education as a result of increased poverty and lack of parental support.

Acknowledges what the learner brings – Learners affected by HIV and AIDS often bring a range of experiences that were previously less common to the learning environment.

Considers the content of formal and non-formal learning – including factual and comprehensive content on HIV and AIDS that is age and gender specific and introduced in the context of practical life skills on ways to protect and respect oneself and others.

Enhances learning processes – with emphasis on inclusion, participation and dialogue. Stigma and discrimination by classmates, teachers, parents and communities must be avoided and addressed so that it does not exclude children from AIDS-affected households from learning.

Provides an environment that is conducive to learning – with the goal of ensuring safe, secure and supportive schools and other learning environments. This includes addressing all forms of violence, providing adequate hygiene and sanitation facilities, and ensuring access to health and nutrition services. Such changes will enable learners to focus on learning rather than being distracted by threats to their well-being.

Quality education at the level of learning system

a) *Structures management and administration to support learning* – The administration must ensure ongoing quality and efficient, equitable use of resources which will guarantee the right of all to learn and have access to education. For example, there might be a need to alter the school timetable to accommodate the work responsibilities of children who head households, or to identify ways to provide childcare so that older siblings can participate in education activities.

b) *Implements relevant and appropriate policies* – that are the foundation for safe, secure and supportive learning environments and that take account of the epidemic. In light of the pandemic, many policies may need to be reviewed to ensure that they take sufficient account of the relationships between the pandemic and education systems.

c) *Promotes the establishment of legislation that supports learning* – A legislative framework supporting the right to education paves the way for policy development, allocation of resources, curriculum reform, teacher education and other elements of quality education.

d) *Requires sufficient resources* – The HIV/AIDS pandemic is, in many locations, placing increasing demands on resources to ensure the provision of quality education for all. These demands are for not only financial resources, although these are significant, but also for personnel and time. Transforming education to address quality entails reassessing how resources are currently employed as well as requiring additional resources.

e) *Measures learning outcomes* – The usual way to measure learning outcomes in literacy, numeracy and other disciplinary knowledge is through the use of standardised tests. Although measuring learning outcomes in terms of cognitive achievements is essential, these do not measure all aspects pertaining to quality education.

The quest for a better understanding of what is wanted from a quality education has extended the desired learning outcomes to include the following:

- *Knowledge* (including literacy, numeracy, core subject knowledge): the essential cognitive achievements that all learners should attain
- *Skills or competencies*: a secure command of ways to solve problems, working in teams, living together and interacting with those who are different
- *Values*: solidarity, gender equality, tolerance, respect for human rights, nonviolence, respect for human life and dignity
- *Behaviours*: the willingness to put into practice what has been learnt; actual change in behaviour and the reinforcement of appropriate behaviour (UNESCO, 2004b)

The preceding definitions of education quality allow for an understanding of the global and international influences that drive the discussion of educational quality. Such approaches to educational quality are embedded in South Africa's policies and education programmes. For example, the reform plans of the education system in South Africa incorporate the EFA principles, as well as targets and guidelines as contained in both the World Declaration on Education for All and the Dakar Framework for Action (DoE 2005a:1–2).

Furthermore, the definitions of quality education as presented above are consistent with the need for an expanded definition of the quality of education proposed by the Ministerial Round Table on quality education (UNESCO, 2003). Education systems today are challenged by the changing character and growing complexity of society; as a result education is expected to make a contribution to addressing a range of concerns relevant to current conditions and problems in

society. These changing demands and expectations have implications for the way in which the quality of education is to be understood (ibid).

Added to this, while the definition of quality is evolving, the usual focus on the ability of the education system and schools to deliver on literacy, numeracy, essential knowledge and skills, teacher competence, the curriculum, teaching/learning methodologies, processes in the learning environment, examinations and assessment, management, administrative practises, planning and policy development remain key to the education quality debate (UNESCO, 2003). Furthermore, to achieve the desired quality, the inputs and process should be of acceptable quality in terms of efficiency, effectiveness, excellence and social justice. The quality output can be achieved only if quality is assured at each level of the education process (UNESCO 2003:10).

Although the quality education framework presented by UNESCO (2004b) focuses specifically on quality education in the context of HIV and AIDS, it is relevant to my study because it describes quality education in terms of the learning needs of those infected and affected. It recognises that quality education should take into account the experiences that infected and affected learners bring to the teaching and learning situation and it provides a new way of viewing quality education.

In the following section I will explore other perspectives on quality education

2.2.2 Other perspectives on quality education

There are various definitions of quality depending on how the term is conceptualised. Harvey (1995) provides a framework for quality by outlining five goals for education that define the vision of quality within education systems:

- *Education quality as exceptionality*: linked with excellence and elitism

- *Education quality as consistency*: equality is the vision that drives education. Quality requires equitable experiences and schools and classrooms should provide learners with consistent experiences across the system.

- *Education quality as fitness-for-purpose*: refinement and perfection in specific subject areas is the vision that shapes the system. Quality is seen as preparing learners for specific

roles. Understanding education quality as fitness-for-purpose can be identified in the Revised National Curriculum Statement Grades R–9 Policy (2002), which envisages the kind of learner who will be inspired by values of democracy, equality, human dignity, life and social justice and seeks to create a lifelong learner who is confident and independent, literate, numerate, multiskilled and compassionate, who has respect for the environment and the ability to participate in society as a critical and active citizen.

- *Education quality as value for money*: education reflects reasonable correspondence to individual and societal investment. Quality is interpreted as the extent to which the system delivers value for money.

- *Education quality as transformative potential*: social or personal change is the vision that drives education. Quality is a catalyst for positive changes in individuals and society in that education promotes social change. This also implies a holistic change (in both cognitive and noncognitive dimensions) in the learners as a result of the education they receive (Tam 2001:51).

Tam (2001:53) argues that any measurement of quality and performance evaluation in higher education that does not focus on students' experiences is bound to be peripheral and will fail to provide information about how students find the experience and how much they are learning and progressing both intellectually and emotionally through the years of university life. This argument can be extended to include basic education.

Adams (1993:12–13), emphasising the fluid nature of education quality, identifies multiple coexisting definitions of quality with the following characteristics:

- Quality has multiple meanings.
- Quality may reflect individual values and interpretations.
- Quality is multidimensional; it may subsume equity and efficiency concerns.
- Quality is dynamic; it changes over time and by context.
- Quality goals may conflict with efficiency, equity or other goals.
- Quality is grounded in values, cultures and traditions; it may be specific to a given nation, province, community, school, parent or individual learner.
- Different stakeholder groups often have different definitions of quality.

O'Sullivan (2006) claims that quality is contextual and thus contextual factors should guide the articulation of quality. "Quality is grounded in cultural traditions, social relations, economic and political life, and is therefore unique to each nation and culture" (O'Sullivan, 2006:249). Critical to a contextual definition are the realities at school level within which teachers work, their professional capacity and the way learners, particularly orphaned learners, experience schooling.

Research grounded in the realities of practice can make a meaningful contribution to understanding the processes of schooling for orphaned learners and "will act as a reminder that micro-level issues are important if change in the education system is to be effected" (Crossley & Vulliamy (1984:202). Ball, in Crossley and Vulliamy (1984:198), asserts that as sociologists are able to contribute to the deliberations of policy making, they need theories of schooling which articulate with the realities that teachers and learners are confronted with on a daily basis. Such approaches to understanding schooling can lead to the refining of macrosystems theories which are assumed to be equally applicable to other societies similar to those from which the theories are derived.

2.2.3 Quality and education traditions

The 2005 EFA Monitoring Report (UNESCO 2004a) points out that different notions of quality are associated with different educational traditions and approaches:

Humanist approaches to education quality are based on the premise that each individual is unique, that all people are born equal and subsequent inequality is a product of circumstances and that individuals construct their own meanings. Therefore, education should remain responsive to individual learners' circumstances and needs (UNESCO 2004a:32). This approach to quality is consistent with the expanded definition of quality as that which "seeks out learners", including those who are being denied access to quality education as a result of increased poverty and lack of parental support (UNESCO 2004b).

Behaviourist approaches to education quality, that is, learners are not able to construct meaning for themselves. These approaches endorse externally defined and controlled curricula based on prescribed objectives and defined independently of the learner, and promote teacher-directed learning, and deductive and didactic pedagogies such as graded tasks, rote learning and

memorisation (UNESCO 2004a:33). Although South Africa has adopted a learner-centred curriculum, some of the elements of behaviourist practice can still be observed in the way teachers operate in many South African classrooms.

Critical approaches to education quality – critical theorists focus on inequality in access to and the outcomes of education.

Good quality is associated with:

- education that promotes social change
- a curriculum and teaching methods that encourage critical analysis of social power relations and of ways in which formal knowledge is produced and transmitted
- active participation by learners in the design of their own learning experience (UNESCO 2004a:34)

Indigenous approaches to education quality – these approaches reassert the importance of education's relevance to the sociocultural circumstances of the nation and the learner. They recognise that learning also happens beyond the confines of the classroom through nonformal and lifelong learning activities (ibid). Such approaches are consistent with conceptualisations of education quality that reflect the values and beliefs, needs and agendas, influence and empowerment of various stakeholders (Moss in Moss & Pence 1994; Adams 1993); quality as defined in terms of socially constructed needs, which are culturally relative and situation-specific (Woodhead & Keynes 1996).

2.2.4 Key education policies geared towards education quality

Policy may be defined as a course of action relating to the selection of goals, the definition of values and the allocation of resources (Codd 1988:235). Public policy sets out a government's intentions regarding certain matters that have a bearing on the common good and welfare of a people (Manganyi 2001:27). In societies in transition, such as South Africa, the key purpose of policy development is to uproot old practices, beliefs and values about the social order and to replace them with a new social order. Both policy and law arise out of perceived social and other needs in society as a whole (ibid: 28). De Clercq (1997) categorises policies into four types:

a) *Substantive policies* reflect what the government intends to implement. An example is the South African Schools Act 84 of 1996.

b) *Symbolic policies* are more rhetorical about needed changes. They set out ideals that cannot necessarily be achieved in practice (Christie, 2008).

c) *Redistributive policies* shift the allocation of resources or rights among social groups. An example is the National Norms and Standards for School Funding (1998).

d) *Regulatory or procedural policies* guide action through laws and regulations.

According to De Clercq (1997:128) most of the new education policies developed by the South African government are symbolic, substantive and redistributive.

The table below summarises a selection of major policies and legislative frameworks geared to the realisation of quality education for all.

Table 1: A summary of major education policies and legislative frameworks in South Africa geared towards education quality

Policy and legislative framework	Summary
Constitution of the Republic of South Africa No 108 of 1996	Requires that education be transformed and democratised in accordance with the values of human dignity, equality, human rights and freedom, non-racism and non-sexism. It guarantees access to basic education for all, with the provision that everyone has the right to basic education, including adult basic education
White Paper on Education and Training (1995)	Recognises that the implementation of the compulsory phase implies not merely securing formal attendance at school, but also ensuring that the material and human resources made available to schools from state funds are sufficient to allow an acceptable quality of learning to proceed.
The South African Schools Act 84 of 1996 (SASA)	This Act seeks to ensure that *all* learners have the right of access to quality education and makes schooling compulsory for children aged 7 to 14.

National Norms and Standards For School Funding (NNSSF) (1998)	This document sets out the national norms and standards for school funding in terms of the South African Schools Act, 1996 (No 84 of 1996). It is aimed at achieving redress through distribution of the education budget.
Amended National Norms and Standards for School Funding (2006)	This document covers aspects of public funding including the public funding of public schools, school fee exemption policies and the "no fee" policy which empowers the Minister of Education to exempt certain schools from charging fees based on poverty levels in the area they serve.
National Policy on Whole School Evaluation (2002)	This policy is aimed at improving the overall education quality in South African schools. The policy is also a response to the Education White Paper 1 of 1995 which points out that the transformation of education in South Africa should emphasise the right of *all* to quality education.
Revised National Curriculum Statement (RNCS) Grades R–9 Policy (2002)	A revised curriculum adopted in 2002. It aims to develop the full potential of all learners as citizens of a democratic South Africa. It is based on the values of the South African Constitution and seeks to create a lifelong learner who is confident and independent, literate, numerate and multi-skilled.
National Norms and Standards for Educators (2000)	Outlines the seven roles of the educator with accompanying competencies. The list of roles and their associated competence is meant to serve as a description of what it means to be a competent educator.

National Policy for an Equitable Provision of an Enabling School Physical Teaching and Learning Environment (2008)	This policy is aimed at addressing inequalities in the teaching and learning environment. It advocates the norm of equal opportunity for *all* by addressing unequal resource provision in the physical teaching and learning environment.
Education White Paper 6 on Building an Inclusive Education and Training System (2001)	This explains the intention of the Department of Education to implement inclusive education at all levels of the system by 2020. Such an inclusive system will allow for the inclusion of vulnerable learners and reduce barriers to learning by means of targeted support structures and mechanisms.

These documents will now be discussed in more detail in terms of their implications for the provision of quality education:

(a) Constitution of the Republic of South Africa No 108 of 1996

The Bill of Rights contained in the Constitution of the Republic of South Africa 1996 (No. 108 of 1996) establishes the right to education in these terms:

Section 29(1) Everyone has the right–

      (a) to a basic education, including adult basic education; and

      (b) to further education, which the state, through reasonable measures, must

          make progressively available and accessible

Section 28 (1) of the Constitution stipulates the rights of the child which includes among others the right to:

      a.   family care or parental care, or to appropriate alternative care when removed from the family environment;

      b.   basic nutrition, shelter, basic health care services and social services;

      c.   be protected from maltreatment, neglect, abuse or degradation;

      d.   be protected from exploitative labour practices;

e. not to be required or permitted to perform work or provide services that-

- are inappropriate for a person of that child's age; or
- place at risk the child's well-being, education, physical or mental health or spiritual, moral or social development.

In terms of the Constitution, the national Department of Education was given the responsibility for developing norms and standards, frameworks and national policies (Christie 2008:131), some of which are discussed in this chapter.

(b) White Paper on Education and Training (1995) and the National Education Policy Act (1996)

The White Paper recognises the importance not only of increasing access but also of improving the quality of education of those who are enrolled at schools. Section 15 of Chapter 13 stipulates *"access without quality improvement in basic general education is a recipe for disappointment"*. The White Paper (1995) places responsibility on education departments to make sure that the quality of education of those who are enrolled at school is improved by providing sufficient schools and classrooms for all children, competent teachers, sufficient textbooks and learning materials, and a supporting learning environment to encourage learners and their parents to value regular school attendance.

Further, the government acknowledges that this goal cannot be achieved without cooperation, hard work and compromises from government, educators, parents and learners (DoE, 1995).

In addition, the White Paper recognises the need to understand, and where possible address, barriers preventing some children from accessing education of equal quality such as distance and lack of transport, hunger, responsibility for younger siblings, household tasks, lack of parental guidance, homelessness and inability to pay for school uniforms (DoE, 1995). The White Paper is relevant to my study as orphaned learners may have physical access to schools, but may be denied access to quality education owing to their deprived circumstances.

Further, the White Paper provides a comprehensive framework for the transformation process needed to change the education system into one which will meet the needs of all learners. It also clearly integrates the notions of education and training and argues that both are key to human

resource development in a country and essential to the development of skills to sustain effective economic development.

The values and principles that should inform education and training policy in South Africa should

- include that the goal of an education and training policy should be to ensure that all learners, adults and children, have access to a lifelong learning process
- recognise that in South Africa, massive inequalities have existed in the past in the provision of education and that central to policy development and planning is the need to redress these inequalities
- provide all state resources according to the principle of equity so that all learners have access to equal educational opportunities
- provide education of good quality (DoE ,1995)

The White Paper on Education and Training (1995) formed the basis for the National Education Policy Act 27 of 1996. This Act provides for a national policy for education. In terms of section 4 of the Act, the policy underpinning the Act shall be directed towards, among other things-

(a) advancing and protecting the fundamental rights of every person guaranteed in terms of Chapter 3 of the Constitution, and in terms of international conventions ratified by Parliament

(b) enabling the education system to contribute to the full personal development of each student, and to the moral, social, cultural, political and economic development of the nation as a whole

(c) achieving equitable education opportunities and the redress of past inequality in education provision

(d) recognising the aptitudes, abilities, interests, prior knowledge and experience of students

(e) enhancing the quality of education and educational innovation through systematic research and development on education, monitoring and evaluating education provision and performance, and training educators and education managers

(f) achieving the cost-effective use of education resources and the sustainable implementation of education services.

(c) The South African Schools Act (SASA) (1996)

In accordance with the Bill of Rights in South Africa's Constitution (Republic of South Africa, 1996), the South African Schools Act (Republic of South Africa,1996) recognises that everyone has the right to a basic education, including adult basic education.

Subsequently, the South African Schools Act 84 of 1996 legislates for compulsory education for learners from the year of their seventh birthday until the age of 15 years or the ninth grade, whichever occurs first. Chapter 2 of this Act stipulates that:

> *… every parent must cause every learner for whom he or she is responsible to attend a school from the first day of the year in which the such learner reaches the age of seven until the last day of the year in which such learner reaches the age of fifteen or the ninth grade whichever occurs first.*

The Act defines a parent as the biological parent or guardian of a learner, the person legally entitled to custody of a learner or the person who undertakes to fulfil the obligations of a parent of legal guardian towards the learner's education at school.

Added to this, section 35 of the Act impresses upon on all public school governing bodies that the quality of education provided in their schools should be improved by supplementing the resources provided by the state.

In addition, the SASA articulates the central role of funding in education by stating that the funding of public schools is the responsibility of the state which is tasked with ensuring the proper exercise of learners' right to education and the redress of past inequalities. It extends this responsibility by requiring the Minister of Education to determine norms and standards for the funding of public schools. This requirement has resulted in the formulation of National Norms and Standards for School Funding and the subsequent amended norms and standards for school funding.

(d) National Norms and Standards for School Funding (NNSSF) (1998)

This policy was aimed at redressing the gap between rich and poor schools, with the ultimate goal of providing quality education. The policy is based on the recognition that socioeconomically disadvantaged learners require a favourable level of funding in order to advance the equality of quality. The policy can be regarded as an equity instrument that "aims at distributing the bulk of recurrent non-personnel expenditure to poorer schools" (DoE 1998:14). The main thrust of the policy is that the poorest 40% of schools would receive 60% of provincial schooling nonpersonnel budget allocations, and the least poor 20% receive 5% of the resources (Sayed *et al*. 2007:35). This is based on the assumption that increasing the level of funding would lead to improvements in the provision of quality education.

Furthermore, in addressing redress and equity, the NNSSF acknowledges that existing funding provisions allow school governing bodies to improve the quality of education by raising funds for additional staff and facilities. In terms of section 45 of the National Norms and Standards for School Funding (NNSSF) (1998), parents who are less poor or who have adequate income are thereby encouraged to increase their own direct financial and other contributions to the quality of their children's education in public schools (DoE ,1998).

Section 46 of the NNSSF recognises the following:

> *Ironically, given the emphasis on redress and equity, the funding provisions of the Act appear to have worked thus far to the advantage of public schools patronised by middle-class and wealthy parents. The apartheid regime favoured such communities with high-quality facilities, equipment and resources. Vigorous fund-raising by parent bodies, including commercial sponsorships and fee income, have enabled many such schools to add to their facilities, equipment and learning resources, and expand their range of cultural and sporting activities. Since 1995, when such schools have been required to downsize their staff establishments, many have been able to recruit additional staff on governing body contracts, paid from the school fund* (DoE 1998).

The above statement confirms the fact that private contributions have been used to employ more educators and accordingly reduce learner–educator ratios, thereby improving the quality of education offered in advantaged schools. These socioeconomic inequalities mean that the poor continue to have unequal access to quality schooling. Motala (2006:90) contends that while

significant progress has been made towards a just distribution of public funds, for schools, significant inequalities persist shaped largely by the social legacy of apartheid. Resource inadequacies in black schools and an abundance of resources in the former white schools contradict the government's commitment to provide basic education of quality for all its learners (Amsterdam 2006:32).

In the same vein, Sayed (2001:262) argues that in educational discourses the meaning of the notion of quality is understood as the need to ensure that learners have access to educational opportunities and resources that were denied under the apartheid system. However, one aspect that is ignored in understanding this notion in educational policy in the South African context is that it legitimises new forms of subtle class-based inequalities in that the NNSSF allows public school governing bodies supported by middle-class and affluent parents to raise additional resources by charging schools fees, thereby making it possible for the middle class to affluent schools to charge fees so that they can improve the quality of education. Similarly, Motala (2006:88) argues that the private costs of schooling are a source of education inequity since private resources are more plentiful for schools that serve high-income families and are an important financing source of quality-related inputs. Given that private resources are an important source for quality-related inputs, this would explain why the poorest schools continue to charge school fees in order to augment their budget so that they can provide the resources needed to improve education quality.

Jansen and Amsterdam (2006:7) point out that efficiency is a useful and necessary addition to the South African education financing discourse. Equity markers give an indication that expenditure is being equally distributed (or redistributed), but do not reflect whether these inputs make a difference to educational outcomes. Policy reforms (such as the NNSSF) need to recognise the fact that resources in themselves cannot account for change in the education system because it is not clear what exactly happens in schools between the designation of resources and the expression of particular (academic) outputs within schools (ibid).

In the same way, Torres (1997:73) contends that even if resources can be injected and new technologies incorporated, quality education for all cannot be achieved unless education and school systems undergo major transformations in terms of renewed ways of thinking and acting, and adopting new conceptual and operational framework. Similarly, the Department of Education (DoE 2003c) document on developing an HIV/AIDS plan for schools asserts that quality

education cannot be guaranteed by resources, regular attendance or the new curriculum because widespread illnesses and death affect the education quality provided in schools. When the daily lives of the learners and the education process are affected, schools stop functioning effectively and educational quality suffers. It is against this background that I maintain that quality education should be understood from the lived experiences of those learners who are or have been affected by illnesses and death of their parent(s).

Additionally, Van der Berg (2006:50) argues that expenditure shifts to the poor without efficient spending may do little to improve educational outcomes. Equity of finance is necessary but it is not a sufficient condition for the equality of educational outcomes (ibid). Between 1991 and 2001 teaching resources were considerably redistributed, however, despite these resource shifts, educational outcomes hardly improved in the previously disadvantaged schools. Van der Berg (2006:61) suggests that the focus should shift to the quality and efficiency of education, particularly in schools serving the poor, in order to achieve the ultimate goal of improved educational outcomes for the poor. What this suggestion points to is that a broader conception of inputs is important in understanding school-specific issues pertaining to inputs. In the context of evolving definitions of the concept of quality education, Carrim and Shalem (1999) argue that a broader conception can only be arrived at with a qualitative study of the nature of the relations among teachers, learners and the parents themselves and the ways in which they experience and interpret their realities. They argue for a theoretical shift from the depiction of school quality in fixed terms, because such approaches are unhelpful in addressing the challenges that face developing schools in South Africa. In the same vein, I maintain that new conceptualisations of quality education could be derived from a qualitative case study based on the narratives of orphaned learners, supported by interviews with these learners' class teachers and guardians.

(e) Amended National Norms and Standards for School Funding (2006)

This is an amended version of the National Norms and Standards for School Funding (NNSSF) of 1998 previously published. The document covers aspects of public funding, including the public funding of public schools, school fee exemption policies and public funding for independent (private) schools. State funding for public schools is provided in two forms: personnel expenditure and nonpersonnel expenditure also referred to as the school allocation (DoE, 2006).

Chapter 6 of the amended NNSSF points out that the government believes that no school fees should be charged by schools serving the poorest communities: "school fees must not be allowed

to become an obstacle in the schooling process, or a barrier preventing access to school especially as far as the most marginalised are concerned" (DoE 2006: 45). This message is reinforced by the suggestion that the no-fees policy and exemptions policy protect the marginalised, as the paragraph continues: "Effective criteria determining which schools should not charge fees, as well as an effective exemptions policy to protect those who are less advantaged economically within fee-charging schools, are of utmost importance" (DoE 2006:45).

As of 2006, a "no-fee" policy empowers the Minister of Education to exempt certain schools from charging school fees based on poverty levels of the area they serve. In terms of this policy, a school is prohibited from charging compulsory school fees if it has been placed in a national quintile[4] or in a part of the quintile that has been identified by the Minister in terms of paragraph 157 and section 39(7) of SASA.

The report of the Organisation For Economic Co-operation and Development (OECD) (2008:161) points out that quintile 1 and 2 schools are prohibited from raising money by fees or other charges, while quintile 5 schools are permitted to augment their budgets by setting high fees that enable them to employ more and better qualified teachers, improve laboratories and libraries and maintain smaller class sizes, thereby improving the quality of education in their schools. The Review of the Financing, Resourcing and Costs of Education in Public Schools (DoE 2003b:36) emphasises the point that because public funding is geared towards the poor, the poorer schools are not expected to raise their own resources.

In addition, this policy document makes references to quality, as captured by the following statement: "Moreover, the school allocation is primarily and exclusively intended for the promotion of efficient and quality education in public schools" (DoE 2006:27). This statement suggests a relationship between school allocation and 'quality education'. However, Hanushek (2003:66) maintains that, in the USA and in other countries, although the quest for quality has contributed to expanding the resources devoted to schools; such resources (inputs) have had little impact on outcomes. Furthermore, it is impossible to dictate educational quality through policy because factors such as poverty, children living in single-parent families (or even child-headed households) have a negative impact on additional resources (ibid:69). Similarly, Reschovsky (2006:33) has reservations about whether increased spending on textbooks and other school supplies is the most effective way of improving the quality of education in South Africa,

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[4] South African schools are divided into five categories or quintiles according to their poverty ranking. The poorest schools are included in quintile 1 and the least poor in quintile 5.

especially in schools serving children from poor families. Jansen (2000:51) has similar reservations about whether increasing the budget for education would translate into the effective provision of quality education.

The OECD report (2008:162) asserts that fee exemptions and no-fee schools do not cover all costs associated with schooling. Payments for transport, uniforms, excursions, stationery and additional learning materials still place a considerable burden on poor families (especially families which rely solely on the social grants provided by the government). The cost of uniforms and transport in particular might be a barrier to access and to daily school attendance. In the case of transport, the distance travelled to and from school, the safety of the learner as he or she travels to school, and excessive tiredness associated with travelling long distances all impact on the child's ability to learn (ibid:162).

Fiske & Ladd (2004) argue that school fees will directly affect school quality only if the government permit schools to significantly augment the resources that government provides. The no-fee policy has done little to help the historically disadvantaged schools in that these schools have found themselves with fee revenue that is too small a portion of the overall budget to have much effect on the overall efficiency of school operations. Hall &Giese (2008:40) acknowledge that the introduction of the no-fee school policy has resulted in increased revenue for no-fee schools, while at the same time relieving poor parents from the burden of having to pay school fees. Nonetheless, increased funding does not necessarily mean sufficient funding neither does it result in quality improvements. Many poor schools operate on budgets that do not enable them to provide quality education.

Added to this, the unfolding of the no-fee schools policy is dependent on the provincial education department's (PED) capacity to implement and monitor the policy The inability of the provinces to implement and monitor this policy is likely to compromise outcomes and maintain inequities (Ahmed & Sayed 2009:214).

(f) National Policy on Whole School Evaluation (WSE) (2002)

This policy was designed by the South African government to improve the overall quality of education in South African schools (DoE 2002b). The policy serves as a response to the

Education White Paper 1 of 1995 which points out that the transformation of education in South Africa should emphasise the right of *all* to quality education.

The WSE Policy (2002) provides some insights into the definition of school quality by indicating that the evaluation of schools will be based on the use of indicators with regard to inputs, process and outputs. *Inputs* are concerned with the main characteristics of each cohort of learners admitted to a school, and the physical resources, funding and professional staff support (which includes the number of teachers at the school, their qualifications and experience, educator development and capacity building); *processes* include the effectiveness of governance (encouraging parental and community involvement); leadership and management (provisions of guidance and counselling and management of resources), safety and security measures and quality of teaching, support and guidance the school provides to help learners develop intellectually and personally; *outputs* cover learners' achievement standards, standards of behaviour and rates of punctuality and attendance.

Since these quality indicators are meant to be applied to all schools across South Africa, Smith & Ngoma-Maema (2003) argue that, as there are vast differences in schools within the country, such a one-size-fits-all approach will not work. Furthermore, the same school can be experienced differently by different groups of learners, suggesting that quality education as stipulated in the WSE Policy can be experienced differently by orphans and non-orphans within the same school. The problem with generalised definitions of quality is that such formulations tend not to be applicable to specific conditions that occur in South African schools, particularly schools located within an impoverished area such as an informal settlement community; neither does conceptualisation of quality take into account specific issues such as orphaned learners' experiences that impact on teaching and learning in schools.

Fullan (1998) observes that educational change is a process of coming to grips with the multiple realities of people, who are the main participants in implementing change. Policies such as the WSE Policy suggest uniformity, but in practice where teachers are expected to perform the same functions there will be marked differences in the ways in which the task is executed. For example, in a study conducted in South African classrooms in Soweto, Fuller & Clarke (1994) observed that the majority of teachers use the learning materials in ways other than they were intended. Their study showed that the textbook as an instructional tool is assigned a particular meaning by these teachers which may differ from the way it was intended to be used so as to

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contribute to student learning. This finding challenges the claim made in the "Action Plan on Improving Access to Free and Quality Basic Education for All", that improving the resources of schools would result in improved learner performance (DoE ,2003a).

Adams (1993) and Harvey & Green (1993) indicate that any conception of quality in South Africa must be relevant to the changing context. Current policies on quality implemented across South African schools do not accommodate the diversity of contexts and value systems (Lucen 2006). In the same way, UNESCO (2003:37) calls attention to the fact that

> … in this changing world context, the meanings, perceptions, and expectations regarding the quality of education are evolving. Quality has become a dynamic concept that has constantly to adapt to a world whose societies are undergoing profound social and economic transformation (UNESCO 2003:37).

This suggests that the term "quality education" has to adapt to the social and economic changes occurring in societies, including the increase in the number of orphaned learners mainly as a result of HIV and AIDS.

(g) Revised National Curriculum Statement Grades R–9 Policy (2002)

The Revised National Curriculum Statement is informed by the aims of the Constitution of the Republic of South Africa (Act 108 of 1996), which provides the basis for curriculum transformation and development in South Africa (DoE 2002a:1). The policy seeks to embody the values expressed in the Constitution in the knowledge and skills it intends to develop. It encourages awareness and understanding of the diversity of cultures, beliefs and worldviews within which the unity of South Africa is manifested among all learners (DoE 2002a:8).

Principles of the RNCS

Some of the principles of the RNCS are outlined below:
- The Curriculum adopts an inclusive approach by specifying minimum requirements for all learners. It aims to address the special educational, social and physical needs of learners in the design and development of appropriate learning programmes (DoE 2002a). Lomofsky & Lazarus (2001:309) point out that the system is based on a belief that all

learners can achieve success. Instead of encouraging learners to conform, their individuality is respected. The outcomes-based approach inherent in this policy document develops teachers' capacity to respond to the diversity in learners' styles and rates of learning.

- The RNCS, which is based on principles informing outcomes based education, considers the process of learning to be as important as the context itself. The RNCS is intended to ensure that all learners are able to develop and achieve to their maximum potential and to ensure that they are equipped for lifelong learning.

- The curriculum aims at providing a base from which learners can develop a high level of knowledge and skills. It supports and expands opportunities to attain skills, acquire knowledge and develop attitudes and values encompassed across the curriculum (DoE 2002a).

- The RNCS recognises that teachers play an important role in the transformation of education in South Africa. It envisages a teacher who is qualified, competent, dedicated and caring and who will be able to fulfil the various educator roles outlined in the Norms and Standards for Educators of 2000 (DoE 2002a :9). Mabogoane (2006:127) maintains that teachers play a pivotal role in ensuring that learning happens in the classroom. Therefore, any educational reform that is unable to focus the efforts of teachers on increased student learning is not likely to realise the expected returns from increased investment in education. It is therefore those reforms that explicitly signal to teachers the behaviour that the state values and that are more likely to have an impact on learning.

Van Wyk & Mothata (1998:4) argue that quality education refers not only to teaching and learning, but that it is also linked to capacity, the appropriateness of the curriculum, the commitment of both the teacher and learner and the way standards are set and assessed. The introduction of Curriculum 2005 was an initiative that was intended to provide quality education to all South African learners. The focus of an outcomes-based curriculum has as its priority the intended results of the learning experience. These results refer to the knowledge, skills, attitudes and values which the learners should acquire. These outcomes provide a means of assuring the quality of education (Van Rensburg 1998:27).

Furthermore, Stephens (2003:12) contends that quality education is not only about changing curricula, and teaching and learning strategies, nor does quality happen by producing plans as a result of external pressure or by setting targets; the improvement of quality requires an understanding of and respect for the different meanings and interpretations people bring, as well as an understanding of the school's culture. Jansen (2001:284–285) maintains that the continued overreliance on political symbolism as the overarching framework for education policy rules out change in schools and improvement in education quality. The argument that Jansen puts forward is that for change to occur in practice, deliberate attention should be focused on implementation that is "concerned with the sobering realities of making change happen in practical terms in sites where it is most manifest and effective, such as schools" (ibid:7).

The OECD report (2008:173) indicates that learners cannot be expected to demonstrate achievement of learning outcomes if they have not had equal learning opportunities. For example, when learners miss school because they have to take care of their ailing parents or there is no supervision of homework, it has a negative effect on their learning opportunities.

(h) Norms and Standards for Educators (2000)

This policy describes the seven roles of educators and their associated set of applied competencies. The roles are meant to serve as a description of what it means to be a competent educator (Morrow 2007). These roles are the following:

1) *Learning mediator*
   - The educator will mediate learning in a manner which is sensitive to the diverse needs of learners, including those who are experiencing barriers to learning.
   - The educator will communicate effectively showing recognition of and respect for the differences of others.

2) *Interpreter and designer of learning programmes and materials*

   The educator will understand and interpret the learning programmes provided, design original learning programmes, identify the requirements for a specific context of learning and select and prepare suitable textual and visual resources for learning. The educator will also select, sequence and pace the learning in a manner sensitive to the differing needs of the subject learning area and learners.

3)   *Leader, administrator and manager*

The educator will make decisions appropriate to the level, manage learning in the classroom, carry out classroom administrative duties efficiently and participate in school decision-making structures. This competence will be performed in ways which are democratic, which support learners and colleagues, and which demonstrate responsiveness to changing circumstances and needs.

4)   *Scholar, researcher and lifelong learner*

The educator will achieve ongoing personal, academic, occupational and professional growth by pursuing reflective study and research in their learning area, in broader professional and educational matters, and in other related fields.

5)   *Community, citizenship and pastoral role*

This role entails

- developing life skills, work skills, a critical, ethical and committed political attitude, and a healthy lifestyle in learners
- showing an appreciation of, and respect for, people with different values, beliefs, practices and cultures
- being able to respond to current social and educational problems with particular emphasis on the issues of violence, drug abuse, poverty, child and women abuse, HIV/AIDS and environmental degradation and accessing and working in partnership with professional services to deal with these issues
- counselling and/or tutoring learners with social or learning problems in need of assistance
- demonstrating caring, committed and ethical professional behaviour and an understanding of education as dealing with the protection of children and the development of the whole person

6)   *Assessor*

The educator will understand that assessment is an essential feature of the teaching and learning process and know how to integrate it into this process.

7)   *Learning area subject/phase specialist*

> The educator will be well grounded in the knowledge, skills, values, principles, methods and procedures relevant to the discipline, subject, learning area, phase of study, or professional or occupational practice.

Morrow (2007:11) contends that the above description of what it means to be a competent educator ignores the reality of the conditions in which the majority of teachers in South Africa work and, in this way, fails to recognise their workload. It ignores the differences in contexts (e.g. schools serving the poorest communities versus those serving middle- and upper-class communities) in which teachers work. Furthermore, teachers will not succeed in carrying out the above responsibilities if they are faced with learners who are experiencing the trauma of having recently lost a parent, or who come from households where there is often a lack of food, communities where the levels of adult illiteracy is high, widespread unemployment, breakdown of the school nutrition programme, the failure of the delivery of stationery and unavailability of counselling services at the school.

Similarly, given that educators teach learners who bring previously uncommon characteristics to the classroom, such as grieving or traumatised children, conceptions of what characterises a competent educator who is able to offer quality education need to change. Ogina (2008), in her study on "Redefining the role of educators in managing the needs of orphaned learners", points out that the educators in her study appeared unprepared for their pastoral role as described in the Norms and Standards for Educators. Added to this, there seemed to be a lack of resources and support through which the educators' pastoral role could be fulfilled.

In their study, Bennell, Hyde & Swainson (2002) report that some of the reasons why schools provide little support in professional services could be due to the absence of a pastoral care policy from the Ministry of Education, the lack of necessary resources and an unsupportive school environment. The National Commission on Special Needs in Education and Training (DoE 1997:15) maintains that basic services which may support learners and the system to minimise and remove barriers, or prevent them from arising, are often lacking or limited in poorer communities. This is especially true in rural areas, as well as in the majority of schools serving poor communities, where access to professional assistance is limited or non-existent.

Moreover, the National Commission points out that a key contributing factor to inappropriate and inadequate support provision relates to the nature of human resource development of both educators and the personnel who provide services to learners and their families. Lack of awareness, service provision which is fragmented and inappropriate to the context in which it takes place, demoralisation and a fear of dealing with a diverse range of needs all result from inadequate and fragmented development of human resources. Not only does poor provisioning in this area lead to a scarcity of necessary skills and knowledge, but it also contributes to a system which is unable to meet a diversity of learner needs and prevent barriers to learning and development (ibid). The Commission further remarks that there is a tremendous shortage of psychologists trained to work in the education sector to provide support to centres of learning, particularly in rural areas.

Added to this, there is a lack of enabling and protective legislation and policy – where legislation or policy fails to protect learners from discrimination or perpetuates particular inequalities it directly contributes to the existence or maintenance of barriers to learning and development. For example, legislation which fails to protect learners from discrimination and fails to provide for minimum standards that accommodate diversity allows for individual practices which may inhibit learner development or lead to provision which is inadequate and inappropriate for the needs that exist (DoE,1997). The design and implementation of an enabling and protective policy would be consistent with notions of an expanded definition of quality education that promotes the establishment of legislation supportive to learning (cf. UNESCO,2004b).

Darling-Hammond (1998) asserts that what finally happens in classrooms and schools is related more to beliefs, knowledge, resources and motivation operating at the local level than to the intentions of the policymakers. Allington (2000) supports this view by pointing out that the implementation of educational policies entails the translation of the policy by individual teachers. Similarly, Malcolm (2001:200) contends that teachers are the agents who are closest to the learners, who function at the critical interface of teaching and learning. I concur with this view of the critical role of teachers as change agents because they are in contact with the learners on a daily basis. However, I do not ignore the fact that teachers are not a homogenous group who respond to change in a uniform way. Teachers may, for example, respond to their roles as stipulated in the Norms and Standards for Educators differently from the way policy dictates.

(i) National Policy for an Equitable Provision of an Enabling School Physical Teaching and
   Learning Environment (2008)

The National Policy for an Equitable Provision of an Enabling School Physical Teaching and Learning Environment recognises that South Africa's democratic government has inherited one of the most inequitable education and training systems in the world. In the past, unequal education opportunities were fostered mainly through the unequal distribution of education resource inputs, which impacted negatively on student learning and subsequently on learning outcomes. The physical teaching and learning environment, which entails school infrastructure and basic services, has historically been one of the most visible indicators of inequitable resource inputs (DoE 2008:7). The physical teaching and learning environment is broadly defined as comprising school infrastructure; basic services; furniture; equipment, books, teaching and learning materials, and co-curricular facilities and equipment (ibid:14). School infrastructure is broadly conceived to include the physical teaching and learning spaces (e.g. classrooms, laboratories); spaces that support teaching and learning (e.g. libraries, counselling centres, health centres); sports facilities; school administrative facilities; facilities for school nutrition and feeding programmes.

The Policy acknowledges the link between the physical environment in which learners are taught, and teaching and learning effectiveness, as well as student learning outcomes. Poor learning environments have been found to contribute to students' irregular attendance and dropping out of school, teacher absenteeism and the teachers' and students' ability to engage in the teaching and learning process. Inequalities in the teaching and learning environment may therefore frustrate core sector policies for improving education quality, the equity of inputs and the equity of outcomes (ibid:7).

The Policy states its commitment to addressing inequitable provisions in the teaching and learning environment in this way:

> *Effective from 2008, norms and standards for the physical teaching and learning environment will be set at the national level by the Department of Education. National norms and standards will set and express in terms of minimum and optimum provision. Along this continuum, norms and standards for school safety, functionality, effectiveness and enrichment will be explicitly defined at a national level by the Department of*

Education. The DoE will also set clear target dates by which a set proportion of schools will meet each level of enablement in its environment. The DoE will also set a clear date by which all South Africa schools will meet norms and standards for effectiveness (DoE 2008 :9).

This policy is expected to facilitate the implementation of existing policies, programmes and legal instruments, such as the South African Schools Act and the Education White Paper 6 on Inclusive Education and Training. Firstly, it addresses elements of the physical teaching and learning environment that constrain effective policy and programme implementation and, secondly, its strategic direction may set new parameters for existing policies and programmes (DoE 2008:18). It attempts to address quality education initiatives such as the provision of the National School Nutrition Programme, guidance and counselling and pastoral care, student health and safety and strengthening school-community relationships.

National School Nutrition Programme – Through this Programme, the DoE seeks to ensure that 60% of the poorest Grades R to 7 learners receive one nutritious meal per day. The target is to have over 8 million learners receiving quality meals at schools that serve the poorest communities by 2012. These programmes would require the availability of clean water, cooking water supplies, cooking facilities, equipment and food supplies. This programme also promotes the establishment of food gardens in schools and communities (DoE 2008:21).

The White Paper on Reconstruction and Development (1994:46) describes the aims of the School Nutrition Programme (formerly known as the Primary School Nutrition Programme) as follows:

> *To contribute to the improvement of education quality by enhancing primary pupils' learning capacity, school attendance and punctuality and contribute to general health development and alleviating hunger. Educating pupils on nutrition and also improving nutritional status through micro-nutrition supplementation.*

The report of the DoE entitled, "Review of financing, resourcing and costs of education in South African public schools" (DOE 2003b:56), maintains that the provision by the state of one nutritious meal impacts positively on education in two ways:

(a) Well-nourished learners perform better in the classroom in that the capacity of learners to concentrate and extract maximum value from their school experience can be severely reduced if they have not received adequate nutrition.

(b) School meals are an incentive for poor parents to ensure that their children attend school regularly.

Guidance and counselling and pastoral care – This policy recognises the need for holistic counselling and pastoral care in schools. In the face of HIV/AIDS and the accompanying physical and psychosocial stress experienced by learners and educators, the government acknowledges that school health and counselling programmes are critical necessities (DoE 2008:22).

Student health and safety – The document points out that nearly 15% of learners are exposed to environments that pose both safety and health hazards. In terms of safety, by 2006, only 5.5% of assessed schools had a functional gate and fence; even fewer had burglar bars and/or an alarm system. To make these schools a safe learning environment, the DoE undertakes to strengthen the implementation of school safety programmes and integrate school safety as a key component of school management (DoE 2008:22)

Strengthening school–community relationships – The relationship between the school and the community is a dual relationship in the sense that communities are critical contributors to the development of their children's schools, education processes and outcomes (DoE 2008:22).

Chapter 2 of the National Policy for an Equitable Provision notes that the degree to which schools can equitably deliver expected educational outcomes partly depends on the adequacy of the inputs and processes they use to transform those inputs into results.

This Policy is consistent with some of the UNICEF notions of the dimensions of quality education, as described earlier in this chapter, that is, quality that seeks out learners, enhances the learning process, provides a conducive learning environment, and implements relevant and appropriate policies. The Policy emphasises the importance of health, safety and nutrition, which is in harmony with the global perspective on education quality (cf.UNESCO 2000; UNICEF 2000; UNESCO 2004b).

(j) Education White Paper 6: Building an Inclusive Education and Training System (2001)

The Education White Paper 6 (2001) outlines the DoE's commitment to the provision of educational opportunities particularly for those learners who experience or have experienced barriers to learning and development or who have dropped out of learning because of the inability of the education and training system to accommodate the diversity of learning needs through curricula, assessment, learning materials and instructional materials (DoE 2001:6). Inclusion focuses on overcoming barriers in the system that prevent it from meeting the full range of learning needs. Inclusion is about supporting all learners, educators and the system as a whole so that the full range of learning needs can be met. White Paper 6 allows schools to move away from aspects of traditional schooling that make it difficult for affected learners to participate fully in the teaching and learning process by acknowledging that attitudes, behaviour, teaching methods, curricula and environment need to change to meet the needs of *all* learners, thus enabling education structures, systems and learning methodologies to meet the needs of *all* learners, accepting and respecting the fact that *all* learners are different in some way and have different learning needs which are equally valued (DoE, 2001).

The White Paper
- acknowledges that all children and youth can learn and that they need support
- recognises the need to create enabling education structures, systems and methodologies to meet the learning needs of all learners
- accepts and respects the fact that all learners are different in some way and have different learning needs (e.g. orphaned learners may have learning needs which are different from those of non-orphaned learners)
- acknowledges that learning occurs at school, in the home and community, and within formal and informal settings and structures (This is in line with the expanded definition of quality education which recognises the importance of formal and non-formal learning)
- changing attitudes, behaviour, teaching methods, curricula and environment to meet the needs of all learners
- maximising the participation of all learners in the culture and the curriculum of educational institutions and uncovering and minimising barriers to learning
- empowering learners by developing their individual strengths and enabling them to participate critically in the learning process (DoE 2001:16)

The National Commission on Special Needs in Education and Training (DoE ,1997) identifies the factors that are conceptualised as barriers to learning and development as those which lead to the inability of the system to accommodate diversity, leading to learning breakdown or the prevention of learners from accessing educational provision of quality. These could include factors such learner absenteeism and grieving learners. According to the Commission, barriers to learning may be located within the learner (and his or her home environment), within the school (e.g. unavailability of counselling services or lack of capacity on the part of the teacher to deal with the emotional difficulties of orphaned learners), within the educational system and within the broader social, economic and political context.

The key barriers to learning identified by the Commission include the following:

- *Socioeconomic barriers.* In South Africa socioeconomic disadvantage has had a negative effect on education and all aspects of social development in the majority of society (Lomofsky & Lazarus 2001:311). The effects of sustained poverty include poor living conditions including undernourishment, overcrowded housing and unemployment; all of which have an adverse impact on learners, especially orphaned learners. Social, economic and political conditions that have had a harmful effect on the physical and emotional wellbeing of learners are, for example, families headed by children or adolescents, sexual abuse resulting from living in unsafe home environments, and physical child abuse, violence and crime, and chronic illness, including HIV/AIDS (DoE 1997:10).

- *Discriminatory negative attitudes* (e.g. isolation of orphaned learners by other learners) become barriers to learning when they are directed at learners in the education system.

- *An inflexible curriculum*, which leads to learning breakdown owing to the lack of relevance of the subject content and the lack of appropriate materials, resources and assistive devices, as well as inflexible styles of teaching that do not allow for variations in individual differences.

- *Language and communication* can be barriers to learning when the medium of instruction is not the learners' first language. This is the case with the learners participating in this study.

- *Inappropriate and inadequate* (or lack of) provision of support services, such as counselling services for grieving children.

- *Lack of parental recognition and involvement* in support for educational provision to learners. When children are orphaned, this becomes a barrier to learning because they are deprived of the love, care, nurturing, comfort, encouragement, teaching of morals and support with homework.

- *Lack of human resource development*, including education and training of teachers and other role players. For example, lack of teacher training to deal with the magnitude of social problems experienced by learners.

- *Lack of protective legislation and policy* to support the development of an inclusive education and training system (DoE 1997:10–14).

An inclusive approach is consistent with the need for an expanded definition of education quality in that inclusive approaches are systemic; they focus on supporting all learners, educators and the system as a whole so that the full range of learning needs can be met. Furthermore, an inclusive approach is in harmony with the notion of education quality that satisfies basic learning needs and enriches the lives of learners and their overall experience of living (cf. UNESCO, 2000).

2.3 CONCLUSION

All the policies and related legislative framework presented in this Chapter are aimed at providing quality education to all learners. Achieving this goal remains a challenge, however, despite massive inputs of resources, particularly in the poorest schools, very little significant change has occurred at a school level in terms of the intended results of the increased inputs. For instance, the Review of the Financing, Resourcing and Costs of Education in Public Schools Report (DoE 2003b:101) recognises the importance of translating resources into improved learner performance. It acknowledges that the quality of education in South African schools is low relative to what the state spends on schooling, suggesting that the South African government does not derive value for the money invested in schooling.

In this chapter, I pointed out that quality is contextual and thus contextual factors should guide the articulation of quality in education. Given that quality education must be locally relevant and culturally appropriate, quality education will take various forms around the world and even in

South African schools. Consequently, there cannot be a single definition or list of criteria for a quality education (UNESCO 2003:2). In the same way, Leu (2005:10) contends that it is unlikely that there is a universal definition of education quality waiting to be discovered nor is there a uniform checklist of quality indicators against which all education systems can or should be measured.

Definitions of quality are not cast in stone and must be open to change. While countries are committed to quality education, they need to acknowledge that there are enormous disparities in different parts of the world making the possibility of equal opportunity to participate in quality education unattainable. Education systems today are challenged by the changing character and growing complexity of society; as a result education is expected to make a contribution to addressing a range of concerns relevant to current conditions and problems in society. These changing demands and expectations have implications for the way in which the quality of education is to be understood (UNESCO, 2003).

Further, although the National Norms and Standards for School Funding was aimed at redressing the inequalities between rich and poor schools, disparities in educational experiences of learners in these two types of school continue to prevail. What this finding points to is that a broader conception of inputs is important in understanding school-specific issues pertaining to inputs.

As observed in the policies discussed, traditional approaches to the quality of education have often relied on measures such as increases in financing and other inputs in the level of providing quality education. While these are necessary and relevant, such inputs may not prove significant when another criterion for defining and measuring the quality of education is used, namely, learning outcomes such as knowledge, competencies, skills, and behaviours (UNESCO, 2003).

Given that the focus has shifted from increasing access to education to improving the quality of learning, the inputs, processes and outputs that surround and foster learning are cardinal (UNAIDS 2006:6). In the context of increasing numbers of orphaned learners, the inputs and processes provided in most of the policies discussed may not be sufficient to meet the learning needs of these learners. The policies which appear to address the learning needs of orphaned learners are the Education White Paper 6 on Inclusive Education and Training System and the National Policy for an Equitable Provision of an Enabling School Physical Teaching and Learning Environment. These policies aim at improving the educational experiences of all

learners particularly for those learners experiencing barriers to learning and development, as such policies advocate for the creation of learning environments that are conducive to meeting the learning needs of all learners.

CHAPTER 3

UNDERSTANDING LIVED EXPERIENCES FROM A SOCIOCULTURAL PERSPECTIVE

3.1 INTRODUCTION

In the previous chapter I argued that education quality focuses on learning and that quality should be understood as a socially constructed, context-specific concept that is subjective in nature and based on the values, beliefs, traditions and interests of the various stakeholders with an interest in education. Conceptualising quality education in this manner is guided by my assumptions about the nature of knowledge: *Firstly,* that there are multiple perspectives of reality: for example, notions of quality education can be described and defined differently based on differences in the learners' social and cultural contexts. *Secondly*, that knowledge is constructed by individuals and that the process of knowledge construction takes place in a sociocultural context (Reagan 2005:9).

In this study I assume that the manner in which orphaned African learners construct their realities is embedded in sociocultural contexts. Given that social and cultural factors guide the articulation of their narratives, this would imply that there may be a richness in their lived experiences that is unique to African communities and that could make a contribution to the body of knowledge. Furthermore, looking at lived experiences from this point of view can provide an explanatory framework for understanding and refining notions of how quality education can be conceptualised from the learners' social and cultural backgrounds.

3.2 SOCIOCULTURAL THEORY

In this study I wish to understand the way in which quality education can be conceptualised from the social and cultural context of the African orphaned learner. A sociocultural theoretical framework based on Vygotsky's view of human development and learning, and more recent studies of development (Enqestrom 2001; Hamer 2005; John-Steiner & Mahn 1996; Lim & Renshaw 2001; Moll 1990; Rogoff 1990; Smith 2002; Valsiner 1987) appear to fit well within my study because sociocultural theory views children as being inseparable from their social and cultural contexts. Furthermore, sociocultural perspectives view human development and learning as taking place in socially and culturally shaped contexts. According to Moll (1990), culture from

a Vygotskian theoretical approach denotes the social milieu in which the lives of the people are embedded, that is, how people live culturally in their everyday lives.

The key concept critical in sociocultural approaches to learning and development is the zone of proximal development (ZPD), which is defined as the distance between a child's "actual development level as determined by independent problem solving" and the higher level of "potential development as determined through problem solving under adult guidance or in collaboration with more capable peers" (Cole *et al*. 1978: 86). The notion of ZPD refers to the fact that learning occurs in collaboration between the child and the adult or a more experienced peer. Through the support of and being involved in joint activities with the adult, the child comes to appropriate and internalise the cultural tools modelled or created during this interaction for him/herself. Additionally, development is seen in terms of the formation of the individual's identities, values, knowledge and skills which occurs through their participation in activities with capable others (Wells & Claxon 2002:3–5).

According to Hedegaard in Daniels (1996:24), the ZPD for the child is determined by the society they are living in and the values and customs with which the children are being brought up. From this perspective, who a person ultimately becomes depends primarily on the activities that she/he participates in and on the support and guidance received from other members of the community in appropriating specific values, knowledge and skills (Wells in Lee & Smagorinsky 2000:55).

Moll & Greenberg in Moll (1990:320) maintain that every household is an educational setting in which interaction between children and adult family members provide contexts in which proximal development occurs. In these contexts, learning is seen as a process of becoming an active participant in the various activities of one's community (Lim & Renshaw 2001). From birth, parents and other family members (which may include older siblings) are centrally involved in children's learning (Cairney 2000). Parents introduce children to language, as they seek to communicate with them and jointly make sense of their shared world. The parent plays the role of listener, information giver and fellow meaning maker in the communication process (Cairney 2000). In other words, the parent and/or other older family members organise the environment so that the younger child can acquire and eventually go beyond that cultural heritage as the conditions of their development (Lecusay, Rossen & Cole 2008:93).

During these interactions families use specific experiences that serve to show what is valued and seen as useful by family members (Edwards 2003:255). As children participate either directly or indirectly in the practices within their immediate context, they observe, explore and develop understandings of the practices, beliefs and meanings. They gain sociocultural knowledge and practices, such as ways of speaking and behaving, procedures for communication, and the values, beliefs and practices of their community culture (Smith 2002). It is by engaging in the practices of their community that children acquire and internalise the strategies and cultural knowledge important in their own culture (John-Steiner & Mahn 1996; Rogoff 1990; Wells & Claxton 2002).

Webb (1993) and Backer, Hannon & Russell (1982) point out that the child's understanding of death is influenced by social, cultural and religious beliefs and values in the child's home environment. Through the child's interaction with the experienced members of the family, the child learns and later internalises beliefs about death and the rituals surrounding it. Similarly, Mdleleni-Bookholane (2003), in her study of the way African learners in a rural area understand the concept of death, maintains that the child's knowledge of cultural meanings embedded in death-related activities are gradually acquired by observing or participating in these practices.

Hale-Benson (1987) studied the way teaching and learning occured in the Afro-American culture. She explored the transmission of the core values that characterise Afro-American culture. In the past, Africans had a wide variety of cultural vehicles for transmitting their culture, with storytelling being the prevalent form used in teaching. Stories were made lively by the mixing of poetry, music, dance and drumming. These performances could serve practical functions like correcting a child or advising a friend of the mistakes of his/her ways or for settling disputes. Since parents had to spend long hours at work, the grandparents cared for these children and were therefore responsible for transmitting African cultural knowledge. The children spent time with their grandparents listening to stories, taking advantage of the peak learning years. When the children went to the fields together with their parents or other adults their education into the culture continued with the singing of spiritual songs and work songs, and the telling of stories, proverbs and folktales. These children acquired coping skills that were transmitted by observing their parents and other adults practise these skills.

In the same way, Kozulin (1998) states that the learning experiences of the majority of Ethiopian children take place in the home setting. In common with the learning experiences of African

children in South Africa, Ethiopian children's experiences include the oral transmission of religious traditions and stories from adult to child. In addition to this, they acquire manual skills and craftsmanship in apprenticeship-like situations where they learn by observing and imitating the practices of their parents or elder siblings. Rogoff's (1990:8) concept of guided participation is relevant here, as it suggests that both guidance and participation in culturally valued activities are essential to children's apprenticeship in thinking.

In the aforementioned learning contexts, the child relies initially on the knowledge and experience of the adults in their lives for development. Over time the child takes on increasing responsibility for his or her own learning and participation (Edwards 2003:255). The guidance that children receive from an adult provides them with the opportunity to internalise activities practised socially, thus advancing their capabilities to manage problem solving on their own (Edwards 2003:262). From a Vygotskian perspective the notion of internalisation refers to the acquisition and transformation of the manner in which children interact with others in specific problem-solving situations (Lecusay *et al.* 2008:96).

It is these forms of interaction that provide the most opportunities for the "learning that leads to development", not only in the early years of life but also in the formal context of schooling (Wells & Claxton 2002:4). Since most African children are raised in extended families, such environments provide opportunities for learning that lead to development because these children get to interact with a number of adults in the household who have acquired sufficient cultural heritage of their own cultural group.

Given that the home is an educational environment in which proximal development occurs, the parents and other family members interact with children with the intention of bringing about change in the children's lives – change in terms of morality, values and attitudes. In common with the way that education occurs in non-formal settings, at school the interactive process between the educator (capable other) and the learner (novice) is intended to bring about change in the learner's thinking, behaviour, attitudes and knowledge (Bantock 1965:101). This suggests that the home and the school play an important role in influencing the child's knowledge, skills, behaviour and attitudes.

Vygotsky cited in Rogoff (1990:150), points out that interaction with more capable peers also brings about cognitive development. In some cultures the acquisition of social responsibility is

the main criterion for adequate development. Interactions between peers are conceived as a means by which children begin to use the intellectual tools of their society. Since children spend more time in direct interaction with one another than with adults, in the home, school and neighbourhood, peer interactions may provide children with the chance to practise role relations, as well as to observe more skilled peers using intellectual tools acquired through interaction with adults.

In many cultures children interact more with other children than with adults (Rogoff 1990:183). In communities where child care is carried out by other children, such a practice may provide young children with problem-solving competencies and other skills that they would need in their interactions with other people (Rogoff 1990:183). Harkness & Super (1983) argue that children's development varies across societies and communities with social relationships and practices influencing development.

In some communities children assume social responsibilities at an age determined by the community. Nsamenang, in Garcia, Pence & Evans (2008), contends that Africans assign sequential cultural tasks to the stages of development that they recognise. They organise child development in terms of sociocultural processes, with cultural beliefs and practices guiding systemic socialisation into each developmental stage. Children graduate progressively from one activity setting or pivotal role to another until they attain adulthood. In a sense children follow an unwritten or hidden curriculum which they acquire at different phases that correspond to the developmental stages recognised by their culture.

The interpretation of sociocultural theory presented above is based on the notion that the manner in which children construct their realities is shaped by their sociocultural contexts. This view challenges the theoretical and epistemological assumptions created historically and the socially informing constructions of childhood (Lloyd-Smith & Tarr 2000) which focus on the role of the individual in constructing reality. The emphasis on the individual has been influenced by Piaget's theory of children's cognitive development, which focused on the role of the individual in the construction of his or her own knowledge rather than on they way the social world contributes to individual development (Rogoff 1990:5). According to Piaget's theory of cognitive development, learning occurs in an unassisted interaction between the child's mental schemas and the objects of the external world (Kozulin 1988:40).

Although Piaget saw the necessity of social factors, he did not see social interactions between children and adults or peers as contributing to cognitive development (Rogoff 1990:5). According to Komba (1998) individualistic approaches to child development will not hold in African society, because an individual cannot be conceived of as separate from the community's values, norms, beliefs and traditions. Nsamenang (2003) argues that such approaches to development differ from the way Africans make sense of the world. In African cultures the individual gains significance from and through his or her relatedness with others (Ellis in Nsamenang 2003:216).

In the discussion that follows, I explore sociocultural theory from an African view of life and examine the way this impacts on learning.

3.3 THE AFRICAN VIEW OF REALITY

As pointed out earlier, the manner in which African children construct their realities is guided by their social and cultural contexts. There is a way of thinking, of knowing and of acting, which is peculiar to Africans. For Africans, what they know is inseparable from how they know it (Teffo in Higgs 2003:13). An African view of life that guides the thinking and actions of Africans is to be found in their lived experiences and not in philosophical abstractions (Nabudere 2008:1). This sense of Africanness is born out of a deep socio-ethical sense of cultural unity that gives the African identity its distinctiveness (Teffo in Higgs 2003:13–14).

According to Komba (1998), in African society an individual cannot be conceived of as separate from the family's and community's values, norms, beliefs and traditions. The family functions as a means by which cultural norms, values, beliefs, rituals, traditions and religious values are transmitted (Holcomb-McCoy 2007; Foster 2000). Thus, the lived experiences of the learners in this study should be understood from the African way of perceiving and interpreting reality. I sought to understand the cultural knowledge that African children have been and continue to be socialised into because I acknowledge that the meanings that these children ascribe to their experiences are unique and should be explored through their beliefs, values and cultural practices. This view of reality can be better understood from the following aspects of African metaphysics:[5] ubuntu philosophy (which encompasses communalism and interdependence) and paranormal beliefs (which include beliefs in ancestral spirits and witchcraft).

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[5]African metaphysics involves the totality of the African's perception of reality (Viriri & Mungwini 2009:180). Ozumba (2004:1) contends that metaphysics is a philosophy which tries to reach a more comprehensive, all-embracing, totalistic view of reality without neglecting the unique place of individual things in the holism of reality.

3.3.1 Ubuntu philosophy

Ubuntu philosophy is the basis for the African philosophy of life and its belief systems in which the people's daily lived experiences are embedded (Nabudere 2008:1). It is a philosophy which captures the belief system of most Africans, according to which people take responsibility for other people (Beets & le Grange 2005: 1200). Letseka, cited in Higgs (2003: 182), points out that the expression, *umuntu ngumuntu ngabantu*, which translates to "a person depends on others just as much as others depend on him/her", captures the underlying principles of interdependence and humanism in African life. According to Venter (2004:151) the humanness referred to here finds expression in communal contexts rather than in the individualism prevalent in many Western societies. However, this does not mean that communalism submerges individualism.

Ubuntu espouses a value system which places an emphasis on the good of the community. The philosophy of ubuntu encompasses communalism and interdependence which is a foundational cornerstone of the African philosophy of life (Olinger, Britz & Olivier 2004:6). Letseka, in Venter (2004:149), contends that an individual is not born with ubuntu, but that this is a communally accepted and desirable standard that a person acquires throughout his/her life.

Tendla, in Komba (1998), and Venter (2004) maintain that the community and the family are placed at the core of African life. An important feature that characterises the African family system is the multigenerational, interdependent, kinship system which is bound together by a sense of obligation to relatives (Martin & Martin 1978:6). In the African family system, children are not the sole responsibility of the parents alone, but are the responsibility of the extended family and the entire clan of adult members (Olinger *et al.* 2004:6). In the same way, Njoh (2006:54) points out that in African traditional society there was never a distinction between biological and nonbiological kin as far as primary parental obligations were concerned. Hence, upon the death of the biological parents, members of the family typically assume responsibility for raising the children. In addition, grandparents raise the children of their unmarried daughters. In this context children are socialised to treat their grandparents as if they were their biological parents. As a result, the "orphan" phenomenon is inconceivable in traditional African society. As Foster (2000) maintains, traditionally, the concept of an orphan did not exist in African societies, since a child in the African tradition can never be without a parent. This suggests that, owing to

the extended family system, African children could never be without an adult(s) who would socialise them in the practices of the community culture.

Martin & Martin (1978:31) contend that the extended family gives its members the emotional security of belonging, knowing they have someone who cares for them, someone they can turn to in times of crisis. Families are the first line of protection for children and they continue to form the core safety net for orphans, as they have done successfully for many generations in sub-Saharan Africa (Heymann & Kidman 2008:8). For example, children whose parents cannot take care of them adequately as a result of illness may have to move in with other relatives. In the same way, Foster (2000) asserts that, in the past, even though a family might not have sufficient resources to care for existing members, it had a sense of obligation and responsibility to take in orphaned children. Orphaned children were cared for by aunts and uncles who took on the care-giving functions of parents. In a South African study, Ogina (2008) points out that most of the orphaned learners in her study received material support from relatives in the form of food and clothes, which suggests that a sense of obligation to take care of relatives continues to be the norm in the African family system.

Brown, Cohon & Wheeler (2002) conducted a study on the role of kinship care in order to understand the experiences of 30 youth being cared for by relatives. Qualitative interviews were conducted to discuss, among other things, issues pertaining to their feelings about school and their experiences of kinship care. The findings revealed that kinship care provides protection, care and stability for these children. Kinship foster care minimises the disruption youth felt about their removal from parental care. The trauma of being removed from their home and family is mitigated by their familiarity with kin care givers because they may have resided part time with a relative during school holidays or over weekends for example.

Core values of ubuntu

Broodryk cited in Olinger *et al*. (2004), identifies the following core values of Ubuntu:

Core value	Associated social values
Humanness	Warmth, tolerance, understanding, peace, humanity
Caring -	Empathy, sympathy, helpfulness, charity, friendliness
Sharing-	Unconditional giving, redistribution, open-handedness
Respect-	Commitment, dignity, obedience, order
Compassion	Love, cohesion, informality, forgiveness, spontaneity

Weisner, in Weisner, Bradley and Kilbride (1997:39), notes that the core values of respect, harmony, interdependence and unity are stressed over and over again as the central virtues of African family life. The traditional African value system as transmitted by the family regards a deep sense of community, human dignity, respect for authority, courage, morals and religion as important. Respect for elders, which is symbolically carried over to respect for ancestors, is a common value. Elders and ancestors are not only symbols of authority, but are also moral authorities (Shimkin & Uchendu in Shimkin, Shimkin & Frate 1978:394). Children are expected to respect the elderly or older people. Furthermore, the elderly believe in quick and decisive discipline so that the child will know what is considered right or wrong conduct (Martin 1978:50; Reagan 2005:71). The responsibility for teaching the child the moral and spiritual values of the community, as well as for ensuring compliance with those values, rests with the immediate family and ultimately the entire community. An important facet of education in the traditional African setting is that all adults in the community become, in essence, teachers for any child they come into contact with (Reagan 2005:71).

In a South African study on the lived experiences of learners from child-headed households, Leatham (2005) notes that, in spite of Westernisation, cultural values remain important in the lives of African adolescents. The participants in her study regarded elders as an important source of information on cultural values and knowledge. The adolescents in her study grew up in the midst of communal practices that developed a sense of community, communal existence and collective responsibility in these young people. In terms of sociocultural approaches to learning and development, this finding suggests that interactions between children and older members of

the family provide opportunities for children to acquire knowledge that is central to family life. Moll & Greenberg, in Moll (1990:323), use the term "funds of knowledge" to describe specific knowledge of strategic importance to the household. They also (ibid: 320) contend that "every household is an educational setting in which the major function is to transmit knowledge that enhances the survival of its dependents".

3.3.2 Paranormal beliefs: a way of knowing in African epistemology

In many African cultures, reality comprises the visible and the invisible. The paranormal could be another way of knowing (Ajei 2007:183). What constitutes reality is that a thing exists, whether seen or unseen by the physical eye (Ozumba 2004:3).

The term "paranormal" is used to describe phenomena which, if authentic, violate basic limiting principles of science (Peltzer 2003:1419). This term refers to hypothesised processes that in principle are "physically impossible" or outside the realm of human capabilities as presently conceived by conventional scientists (Thalbourne in Irwin 1993:1). Ajei (2007:186) argues that belief in the occurrence of paranormal events (belief in the occurrence of events which seems to contradict the fundamental ideas and principles upon which modern science is based) is common among non-Western cultures, yet their ontological status and whether they can be legitimate sources of knowledge have been persistently denied by subscribers to mainstream Western science. For example, Ayisi (1972:75) points out that adults or household heads of the Akan tribe in Ghana are exhorted to put the first morsel of food or pour a drop of water on the ground for the ancestors before eating. Although this practice may be regarded as sociologically dysfunctional, its metaphysical plausibility is demonstrated by the psychological value of the practice to the people. These are symbols which reaffirm the belief in the world of spirits as an integral part of African belief systems.

Africans believe that the dead continue to exist in a spirit form and as such they are recognised as the living-dead or ancestors. African philosophy holds that the ancestors can, when called upon by the living, intercede and advise them in certain circumstances (Nabudere 2008:4). In the same way, Patel, Mutambirwa & Mhiwatiwa (1995) point out that, in many sub-Saharan African societies, there is extensive belief in a spiritual world inhabited by ancestors and evil spirits. The human spirits are associated with the deceased; these are the spirits of deceased relatives. It is believed that the spirits of the dead occasionally make their presence felt by the living. Such

occasions arise when the living violate a societal norm and the spirit of the dead may assert its presence by punishing the living. These spirits are believed to express their discontent with the behaviour of the living by causing terrible or unpleasant things to happen to them and/or members of their families. Once this occurs, the living are required to perform certain rituals to appease the dead (Njoh 2006:38). For example, in a South African study conducted on the lived experiences of orphans in child-headed households, Masondo (2006) found that orphans have a strong belief in the ancestors. They believe in their deceased parents' ability to watch over them, suggesting that even though the parent may not be physically present to protect them, they experience a sense of security knowing that the deceased protect them.

Religion provides another arena for belief in God – the Supreme Being. Some Africans believe in one God while others believe in a variety of gods and spirits. Although Christianity has come to influence African spirituality, it has not done away with African traditional beliefs (Nabudere 2008:4). Levin, in Hale-Benson (1987), points out that the Afro-Americans' belief in magical folk was a central and necessary part of their existence. Their African religious tradition stood beside their Christian religion and was both a source of strength and release. Their belief system provided a sense of group identity and a source of power and knowledge that were alternative to those of their employers. These beliefs were closely associated with magic and faith in the religious realm and were also expressed in medical practices.

In African cultures, the concept of causality is central to their metaphysics (Viriri & Mungwini 2009:181). Africans believe in invisible forces and it is in these forces that Africans seek explanations for certain happenings that cannot be explained by normal or rational means (Nabudere 2008:4). African life is permeated by the understanding that nothing happens without cause (Ozumba 2004:4). The idea of causality is linked to the African belief in the immortality of the spiritual being (Viriri & Mungwini 2009:181). Among the living, spiritual beings are important participants in shaping everything that happens and by their very nature they occupy a better position in determining events and influencing them, as they are no longer subject to the limitations of time and space. The causes most frequently cited to explain cases of misfortune, illness and death are attributed to either punishment by the ancestral spirits or the operation of witchcraft (Viriri & Mungwini 2009:181).

African metaphysics has held that there is a causal link between misfortune, illness and death (Viriri & Mungwini 2009:189). The way African people perceive, interpret and act on illness is

related to their cultural beliefs (Njoh 2006:159). Wreford (1995) and Manala (2006) argue that throughout the African continent the onset of illness is attributed to witchcraft among other things. The spirits of the dead may be invoked to help resolve a problem that the living may be facing, such as an unexplained illness in the family (Njoh 2006:38). These beliefs play an important role in guiding people when they are sick. Traditional healers are recognised by many as having the ability to heal the sick by virtue of their intimate knowledge of herbal medicine and their special ability to communicate with the ancestors.

Manala (2006) argues that the belief systems of African people such as the belief in the role of ancestors and witchcraft in causing sickness and other misfortunes are often viewed as irrational and meaningless from a Western worldview. Manala (2006) contends that this rejection does not resonate with the African worldview in which health problems are understood from an African religious perspective.

3.4 THE EROSION OF TRADITIONAL SOCIOCULTURAL PRACTICES

The extended family has been described as a structure that serves to socialise African children into the knowledge, values, beliefs and practices of their communities. Added to this, the extended family is built on the value system of communalism and interdependence. Communalism implies living collectively with the objective of promoting the good of the community. It is believed that once the good of the group is assured, the benefits will flow though to individual members (Olinger *et al*. 2004:6). Members of the extended family depend on each other for social, emotional and material support as well as for care-giving responsibilities. However, it appears that the sociocultural practices that are the foundational cornerstone of the African philosophy of life are diminishing owing to an increase in adult deaths and poverty.

The capacity and resources that the extended family have been providing for orphaned children and other relatives have been stretched to breaking point, as those providing the necessary care are, in many cases, already impoverished (Evans, 2002). Furthermore, as the sharing of care-giving responsibilities is diminishing, especially in the urban areas, children raised in child/adolescent-headed families are deprived of the protection, love and support of parents and relatives (Leatham, 2005). Shared caretaking is the part of a culture that has deep emotional and moral significance and remains a powerful mechanism for ensuring the meeting of basic needs and for giving its individual members a sense of belonging (Weisner in Weisner *et al.* 1997:21).

Nyamukapa, Foster & Gregson's (2003) study showed that orphaned children tend to be found disproportionately in poorer households, largely because they reside in female and elderly-headed households that are themselves typically poor as a result of unemployment or low paying jobs. The economic pressures of urban life threaten to break kinship patterns. Income from old age pensions and social grants and low paying jobs is insufficient to keep most family members from living in poverty (Martin & Martin 1978:32). When families take on orphan care-giving responsibilities without additional income, financial difficulties increase.

Heymann & Kidman (2008) report that approximately half of the orphan caregivers surveyed in Botswana reported financial difficulties owing to this extra care-giving. These difficulties led to shortages in paying for basic needs such as food, shelter, water and transportation (Heymann & Kidman 2008:1). In a South African context, families, extended families and friends within the African culture are expected and willing to share responsibility for caring for relatives' children as far as their resources allow them to during difficult times (Leatham, 2005). This suggests that although members of the extended family are bound by obligation to take care of relatives, they find themselves financially burdened and impoverished in supporting orphaned children.

Weisner *et al*.(1997:40) contend that under current conditions of resource scarcity it would be of great concern if the tradition of socially distributed family nurturance were to be lost, as it is an important cultural model and a set of social practices that is available to Kenyans and others for the social support and nurturance of future generations of children.

Foster, Makufa, Drew & Kralovec (1997) assert that the child-headed family phenomenon does not necessarily imply that extended families are abandoning their traditional responsibility for caring for the children of relatives. Their study has shown that although relatives may not take in orphaned children owing to financial difficulties, most child-headed households were receiving regular supportive visits and limited amounts of material support from their extended families. This finding does not correspond with what Leatham (2005) and Ogina (2008) established in their studies. Leatham (2005) found that members of child-headed households very often do not have the protection and support of relatives during times of difficulty. Similarly, Ogina (2008) found that some of the learners from child-headed families lacked food, adult supervision and care. This may imply that the core values of caring, sharing, compassion and humanness which characterise African life are gradually losing ground.

Another aspect of traditional African practice that is changing is sibling care-giving. It is important to note that although sibling caretaking is a common cultural practice in African society, it occurred under the overall management of other adults (parent, aunts, and uncles). Sibling care-giving was a way of preparing African children for the adult world and was seen as a form of shared domestic management and family social support alongside other domestic chores. According to this practice, children are expected to turn to parents, older siblings, cousins, aunts, grandparents and socially recognised others for help. From a sociocultural perspective, this means that children practise care-giving under the guidance of adults who have already acquired the cultural heritage of their group. It is in these apprenticeship-like situations that African children learn by observing and imitating the practices of adults and capable siblings. The guidance that children receive in care-giving and participation in shared domestic management and domestic chores provides them with opportunities to internalise these socially practised activities, thus advancing their ability to manage these on their own.

However, the sibling care-giving that occurs in most child/adolescent-headed households does not occur under the supervision and guidance of other adults. As a result, children raised in these households are deprived of a support system that is characterised by affection, physical comfort, assistance, shared problem solving, the provision of food and other resources, protection against harm, and coherent moral and cultural teaching (Weisner in Weisner *et al*. 1997:23). Nonetheless, Leatham (2005) points out that although members of child-headed families experience the need for adult love, care and support, older siblings take overall responsibility for the household, giving emotional care and even disciplining their siblings as they have learnt to do from their parents.

3.5 WHAT WOULD QUALITY EDUCATION MEAN WITHIN A SOCIOCULTURAL PERSPECTIVE?

As pointed out in the previous chapter, quality is grounded in the cultural traditions, social relations, and the economic and political life of specific cultures. In the traditional African culture, education cannot and should not be separated from the way African people experience life itself. The child gradually acquires the skills, knowledge and attitudes appropriate to life in his or her community in a natural process – an education inspired by a spirit of "ubuntu" in the service of the community (Higgs 2003:16).

African metaphysics is holistic and interrelated (Ozumba 2004:4). In the light of the African philosophy of life, my study embraces a holistic education – the kind of education that focuses not only on the cognitive aspects of the learner, but one that also includes other aspects such as values, behaviours and interpersonal skills that are an integral part of educating for ubuntu and promoting communally accepted and desirable moral norms and virtues (Venter 2004:158). In the same way, Hamm (1989) contends that a holistic education targets the education of the whole child – the cognitive, the emotional and the social are all interrelated. Thus, Bantock (1965:101) uses the concept of being educated to refer to the sum total of educative experiences of all kinds that the person has had during his or her lifetime and which have made them what they are.

Wells & Claxton (2002:5) point out that, in an educational context, there has been a tendency to overlook the interdependence of emotions, thought and activities and to focus exclusively on intellectual activities. Forman, Minick & Stone (1993:85) contend that to attend only to the cognitive "is to miss the powerful role that affect plays in motivating and integrating learning and development". When teachers personalise academic concerns by giving explicit attention to the emotional state of the learner, such expressions of understanding of individual children's feelings and interests play an important role in children's emotional and intellectual development.

In their studies, Leatham (2005) and Ogina (2008) note that orphaned learners experience the need for emotional support. Leatham (2005) contends that African adolescents experience various emotions such as sadness, pain, uncertainty, fear and vulnerability and that they find it difficult to put aside their emotional problems during school time, which affects their academic performance. In the same way, Ogina (2008) argues that the grieving child comes to school with emotional needs and may find it difficult to concentrate in class.

Additionally, Foster (2002:502) asserts that emotional well-being is a pre-condition for sustainable educational support, as depressed children may be unable to participate effectively in school activities. Makame in Nyamukapa *et al*. (2003: 26), are of the opinion that the loss of a mother has a detrimental effect on a child's education because of the greater emotional difficulties experienced. Foster (2002) points out that, in Uganda, almost all HIV-positive parents who participated in their study were concerned about their children's future in relation to economic factors and only 10% were concerned about the emotional wellbeing of their children. Furthermore, Foster (2002) emphasises the importance of addressing the emotional needs of orphaned children, as these children may, at some point, demonstrate adult-type grieving

behaviour such as weeping and, at other times, normal behaviour such as play. This behaviour fluctuation may be baffling to adults particularly teachers and they may respond by punishing, rejecting or ignoring the affected child, thereby compounding the problem.

Forman *et al*. (1993:64) point out that classroom discourse is concerned with more than merely the topics that make up the curriculum. Learners' understanding of a topic is rooted in their experiences, which are infused with personal and cultural values as well as being located in a particular historical and geographical context. Furthermore, the manner in which learners engage with a topic depends on their self-image and their immediate feeling state – such as grieving. Thus, it is not only subject content that is negotiated during classroom discourse but also attitudes, feelings and values. What this suggests is that to engage in effective discourse in the teaching and learning environment is more complex than learning subject content.

Thus, in this study, I contend that a quality education would attend to knowledge, skills, values and behaviour. In this study a holistic approach to quality education appears to be relevant, as the needs of orphaned learners may go beyond cognitive support or even material support – such as the provision of a meal at school – to addressing emotional and behavioural aspects. A holistic approach is consistent with UNESCO's (2008:6) conception of a holistic and rights-based education which it ascribes to an inclusive quality education that meets basic learning needs and enriches the lives of all learners, regardless of their background and circumstances.

Additionally, a holistic education that encompasses the African principles of ubuntu is consistent with the desired learning outcomes of an expanded definition of quality education which entails knowledge, skills or competencies, values and behaviour. This implies that a quality education would include skills or competencies such as interpersonal and cooperative skills (Venter 2004:158). The development of cooperative skills in younger people plays an important role in promoting and sustaining communal interdependence and concern for the welfare of others (Letseka cited in Venter 2004:158).

The social values of warmth, empathy, love and understanding capture the spirit in which an environment conducive to learning could be created. Beets & Le Grange (2005:1202) point out that humanness towards and caring unconditionally for learners are fundamental to effective teaching and learning. Learners experience assessment (and the learning process) positively when

they are certain that the teacher who guides the learning process is a humane and caring person who is fully aware of their fears and challenges (Beets & van Louw 2005:187) .

Given that parents play an important role in providing the love and care needed by their children, when children become orphaned they are deprived of this love, nurturing, comfort, encouragement and teaching of morals. Leatham (2005) points out that in the absence of parents (or surrogate parents), orphaned learners are turning to educators as substitutes for parents, suggesting that the role of educators and the school community in supporting orphaned learners is becoming increasingly critical. Educators, principals and other adult members of the school community should therefore model appropriate values and behaviour. In so doing the learners can come to appropriate and internalise these attitudes, values, skills and behaviours that have been modelled for themselves.

Respect, sharing with others, caring for others and compassion are qualities that all teachers (and all learners) should have and that are necessary to ensure quality teaching and learning (Venter 2004:153). In a South African study conducted on the role of educators in managing the needs of orphaned learners, Ogina (2008) points out that the educators who responded to the noncognitive needs of orphaned learners did so out of empathy and not necessarily as a result of fulfilling the pastoral role as one of the seven roles of an educator stipulated in the Norms and Standards for Educators document. This suggests that these educators were guided by concern for the welfare of others which is one of the core values of ubuntu and which they may have internalised by engaging in the practices of their community culture.

In educational discourse, where educators demonstrate empathy, compassion, kindness, helpfulness, unconditional giving and commitment to meeting the needs of others, particularly the learners, this would promote a collective effort directed ultimately at the good and wellbeing of the community (Higgs 2003:17). Fairness and humanness are, according to Letseka 2000 cited in Higgs (2003), crucial to personal wellbeing. A fulfilled and flourishing life ought to be one in which persons are well fed, well clothed and housed, in good health, loved and secure, and able to make a conscious effort to treat others with fairness and humanness because they in turn are treated that way. This is consistent with an inclusive quality education which enriches the lives of all learners.

Teachers stand in a special relationship with their learners and the community they serve. This relationship implies the commitment of the teacher, as a member of the community, to guiding the learners to the ZPD. The sincerity and level of commitment expresses the individual teacher's humanity in the relationship (Beets & van Louw 2005:184).

The Revised National Curriculum Statement envisions teachers who are qualified, competent, dedicated and caring, and who will be able to fulfil the various roles outlined in the Norms and Standards for Educators of 2000. Of particular relevance to this study are the community, citizenship and the pastoral role of educators. Some of the practical competences related to this particular role include

- o showing an appreciation of, and respect for, people of different values, beliefs, practices and cultures
- o counselling and/or tutoring learners in need of assistance with social or learning problems
- o demonstrating caring, committed and ethical professional behaviour and an understanding of education as dealing with the protection of children and the development of the whole person
- o being able to respond to current social and educational problems with particular emphasis on the issues of violence, drug abuse, poverty, child and women abuse

This broad framework of the educator's role could provide parameters within which the core values of ubuntu could be effected (Beets & van Louw 2005:182). Ogina (2008:8) adds to this, arguing that the community, citizenship and pastoral role requires educators to demonstrate the ability to develop a supportive and empowering environment for learners and to respond to the educational and other needs of learners. In this way the educator would be responding to the other aspects of a holistic approach to quality education as described in the previous chapter.

As pointed out in the previous chapter, a quality education focuses on learning that occurs in both formal and informal settings. The learning experiences in both settings can either hamper or enhance learning. Therefore, the enhancement of quality education at all levels of the education system and ensuring that all learners attend school and succeed would require strengthening the linkages and bridges between formal and informal education. Schools and other learning environments should be transformed to cater for the needs of all individuals in a community and

to respond to the diversity of the learners, regardless of their social origin, culture or individual characteristics (UNESCO 2008:6).

John-Steiner and Mahn (1996) point out that the manner in which children construct knowledge in nonschool environments and the relationship of this knowledge with what is taught in school is particularly relevant for school learning. When children begin formal schooling, they start with a foundation shaped by the nature of the interaction they have with their caregivers and the valued practices and beliefs of their own culture. The EFA Global Monitoring Report (UNESCO 2004a:34) acknowledges that: "All learners have rich sources of prior knowledge, accumulated through a variety of experiences, which educators should draw out and nourish."

Fayden (2005:26) argues that the rich knowledge acquired from learners' home environments should not be compared to that of their mainstream counterparts, but should be studied through their lived experiences, actions and values.

In addition, Ginsburg, in Bowman (1993), points out that, to elicit this knowledge in the classroom context; children must see the connection between what they already know and what is being taught in school. Lim & Renshaw (2001:15) echo this as follows:

> *… learning and teaching must not disconnect individuals from their social and cultural contexts but consider them within and provide them a voice to speak from their cultural spaces and frameworks of relationships and communities.*

African philosophy provides a philosophical framework that can, and should, contribute to the transformation of educational discourse in philosophy of education in South Africa. In this regard, the discourse in such philosophy needs to take note of the contribution that African philosophy can make to the transformation of educational theory and practice. An African philosophy engendered by its appreciation for a pragmatic concern for a better quality of life for all (Higgs 2003:17) could provide a framework within which a holistic quality education could be understood. Mighty (2001:6) contends that if principles such as ubuntu or similar philosophies were to be adopted in classrooms, the learners who had these cultures as part of their social identity would be taught to value different views of life. As teachers promote collaborative and interactive pedagogies, they also need to model the value of diversity in their teaching consciously. They need to take cognisance of sociocultural diversity in their classrooms as well

as other forms of diversity, such as differences in personalities, stages of cognitive development and learning styles, and differences in social and cultural experiences.

3.6 CONCLUSION

This chapter presented a sociocultural perspective aimed at understanding the way culture shapes and influences learners' experience of education; it argued that understanding the sociocultural context of an orphan is essential when attempting to make sense of the lived experiences of orphaned learners, as these lived experiences will reflect the way sociocultural influences shape their experiences and learning.

Given that the inputs that children bring with them to school are embedded in their family and community, it is important to understand the traditional African family system. A sociocultural perspective allows for the lived experiences of orphaned learners to be viewed from an Afro-centric perspective, wherein lived experiences cannot be conceived as happening independently of the learners' family and community values, norms, beliefs and traditions.

The chapter gave insights into the African family structure and the community as resources that have the potential to promote positive educational outcomes for orphaned learners in terms of providing emotional, social and material support. The support offered by these institutions for emotional, behavioural and attitudinal variables can have a significant influence on these learners' academic achievement. Furthermore, Reagan (2005:80) contends that much can be learnt from the African educational tradition that would be to the benefit of contemporary educational thought and practice. For example, communal responsibility for the education of children, concerns with children's moral and character development and education as an integral component of social life are important in contributing to the educational experiences of African children. These aspects are important in the light of the current conception of quality education as one that satisfies basic learning needs and enriches the lives of learners and their overall experience of living, and also in the context of extended meanings of quality education with desired learning outcomes that include knowledge, skills, values and behaviour.

The chapter challenged individualistic approaches to learning, arguing that African children have been socialised to be relational and interdependent and, thus, their learning cannot be conceived of as happening independently from the values, norms, beliefs and traditions of their community. Children's learning should be viewed through their interactions with adults and older peers in

their community, as learning in this context should be seen as a multidirectional process of interaction and exchange that builds the capacity of orphaned learners to make unique contributions to the body of knowledge on African perspectives constructed on culturally grounded bodies of knowledge.

CHAPTER 4

RESEARCH DESIGN

4.1 INTRODUCTION

In this chapter I describe and explain the strategies I used to obtain data that would cast new light on the relationship between government policies geared to the realisation of educational quality discussed in Chapter 2 and the lived experiences of orphaned learners. I will elaborate on my research design and its epistemological underpinnings and discuss the data gathering techniques that were used. Dilthey in van Manen (1990:35), describes a lived experience as people's immediate and pre-reflective consciousness of their lives. In other words, lived experience suggests the totality of an African child's life.

I chose to use a qualitative research design for this study, as it is the method that would help in investigating the central question that guided this study: What is the possible relationship between the intended official policies on the provision of quality education and the type of education experienced by orphaned learners?

4.2 PHILOSOPHICAL ASSUMPTIONS

This research involves the attaining of an in-depth understanding of the orphaned learners' rich and varied daily experiences at home and at school so that I could infer the quality of the education received by these learners. Exploring their daily learning experiences required getting as close as possible to these learners with the intention of understanding how they construct their realities.

A growing number of researchers argue that children should be given a voice in research and that research needs to be *with* children and not *about* or *on* children (Hood, Kelly & Mayall 1996; Lewis & Lindsay 2000; Lloyed-Smith & Tarr 2000; Hart & Tyrer 2006). This represents an important departure from traditional approaches, according to which children are seen solely as

objects to be studied (Hart & Tyrer 2006:21) instead of being regarded as social actors who are capable of constructing their own realities through the process of making meaning of their lived experiences. Social research based on seeing children as social actors rather than as objects of socialisation has placed a new emphasis on seeking information directly from children themselves (Thomas & O'Kane 1998; Docherty & Sandelowski 1999).

Seeking to understand how children construct their realities may be better understood within an interpretive-constructivist paradigm, which is rooted in understanding how people construct meaning (Newman 2000:70). This approach attempts to gain entry into the conceptual world of its subjects in order to understand how and what meaning they construct around the events in their daily lives (Bogdan & Biklen 1992).
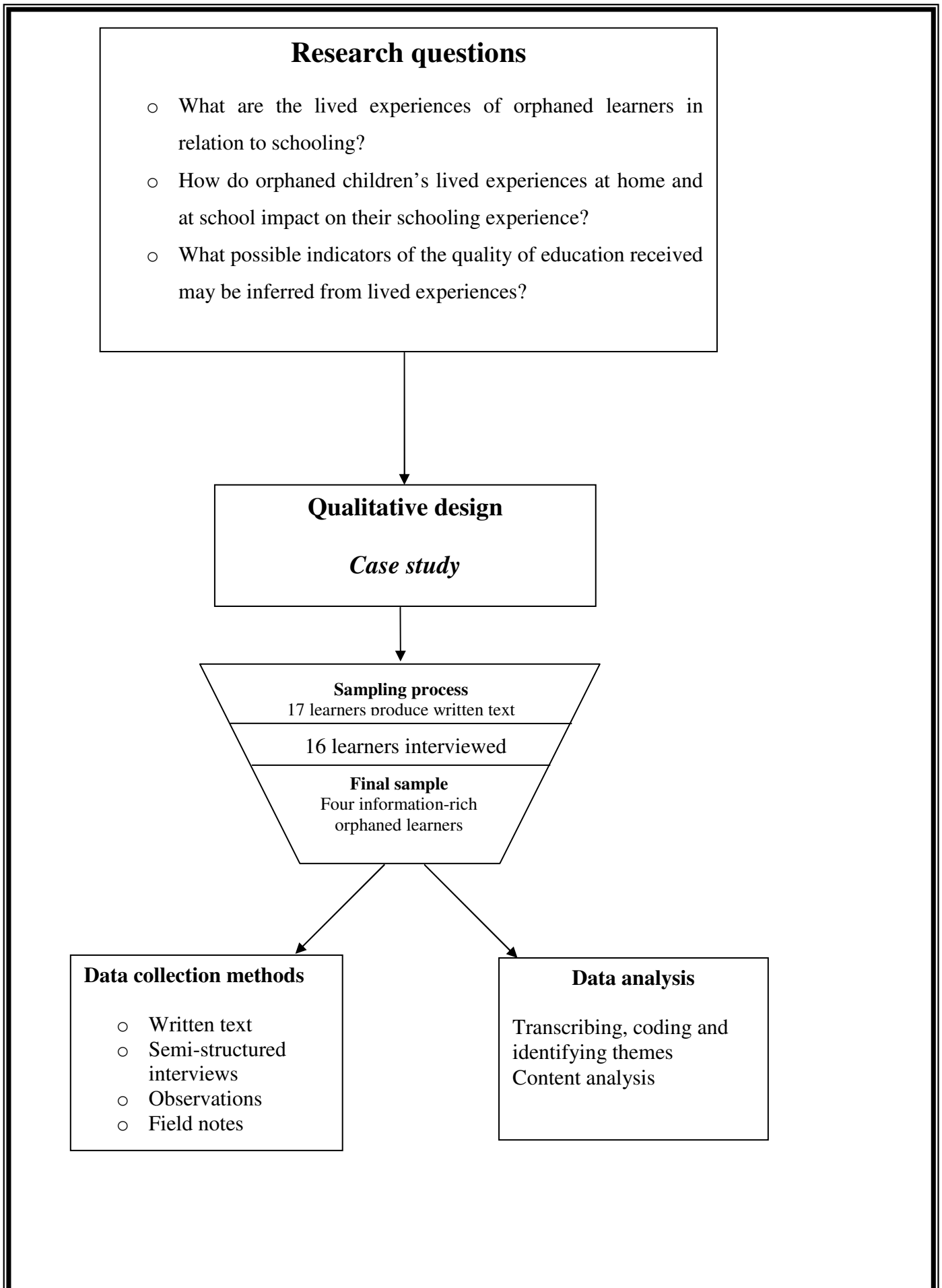
According to Newman (2000:70), the constructionist approach suggests that each child's construction of meaning should be explored for itself and in relation to local values. As the interpretive-constructivist paradigm focuses on interpreting and creating meaning from the experiences of the participants, it enabled me to interpret and deconstruct the realities of orphaned learners in relation to their daily home and school experience, as well as helping me to establish how their experiences impact on the quality of the education they experience.

Furthermore, in order to gain a deeper understanding of the constructed realities and to analyse the meanings constructed from the lived experiences of these learners, I sought to listen to the views of teachers and guardians in order to comprehend the sociocultural experiences that children bring to the teaching and learning situation. In this way I was able to build a comprehensive description of the phenomenon from multiple perspectives. As Creswell (2007:18) points out, qualitative researchers conduct a study with the intention of illustrating and reporting these multiple realities through actual quotes and themes formed from the words of the participants themselves and providing evidence of various individuals' different perspectives, such as teachers and guardians.

To the interpretive researcher, the purpose of research is to advance knowledge by describing and interpreting the phenomenon under study in search of deep perspectives on particular events and theoretical insights (Bassey 1999:44). In this study my aim is to advance knowledge on how quality in education can be conceptualised by describing and interpreting the narratives of African orphaned learners in terms of their sociocultural experiences.

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Figure B: The Research Process

Research questions

o What are the lived experiences of orphaned learners in relation to schooling?

o How do orphaned children's lived experiences at home and at school impact on their schooling experience?

o What possible indicators of the quality of education received may be inferred from lived experiences?

Qualitative design

Case study

Sampling process
17 learners produce written text

16 learners interviewed

Final sample
Four information-rich
orphaned learners

Data collection methods

o Written text
o Semi-structured interviews
o Observations
o Field notes

Data analysis

Transcribing, coding and identifying themes
Content analysis

4.3.1 A QUALITATIVE CASE STUDY

The decision to use a qualitative case study was informed by the fact that I needed to understand the context in which educational policies were implemented in order to determine the factors that hinder and support learning. The case study approach was a preferred strategy because case study enquiry occurs in a real-life context (Yin 1994:13). It investigates contemporary phenomena when the boundaries between phenomena and context are not clearly evident. In real-life situations phenomena and context are not always distinguishable. Given that government policies define quality education among others in terms of an increase in resources, particularly to the poorest schools, I wanted to understand the specific conditions prevailing in these schools and in the homes of learners in order to infer possible indicators of the quality of education received.

In qualitative research the variables of the phenomena cannot be separated from their context (Merriam,1988). In this study I recognise that the lived experiences of African learners are inseparable from their social and cultural contexts. Accordingly, the methodology that I chose took into account the complex social and cultural contexts that shape human experiences. Qualitative research does not ignore but rather addresses the complexities of the various aspects of schooling and takes account of different experiences and perspectives (Bassey,1999).

Qualitative case studies allow the researcher to collect rich descriptive data from the participants, including feelings, thought processes and emotions, which cannot be achieved using quantitative research methods (Merriam 1988; Marshall & Rossman 1999). Given that qualitative case studies focus on a holistic description and explanation of a particular situation, they provide a thick description of the phenomenon under investigation. Crossley & Vulliamy (1984:198) support this statement by maintaining that case study methods are well placed to offer in-depth descriptions of participants' everyday realities "which may not be apparent to policy makers who lack a detailed understanding of the local context in which policy is made functional".

As an interpretive-constructivist researcher, a characteristic of qualitative research (Bassey,1999), I was interested in describing and interpreting the words of the African learners from what I had read in their stories, had been told during the interviews with them, had observed in their homes and had observed when watching them during school hours. The intention of this was to obtain richer insights into their experiences.

As Yin (1994: 13) contends, case study inquiry relies on multiple sources of evidence, with data needing to converge in a triangulating fashion, and as another result benefits from the prior development of theoretical propositions to guide data collection and analysis.

4.3.2 DATA COLLECTION

This is a case study on the lived experiences of orphaned African primary school learners residing with relatives.

4.3.2.1 Identifying the data collection site

In identifying the school from which I collected the data, I was firstly guided by my study focus – studying orphaned primary school learners from a poor socioeconomic background. The school was consciously chosen from an under-resourced, informal settlement, which is typical in the context of a developing country like South Africa. I chose a primary school because its learners are targeted by the Millennium Development Goals. Goal number 2 aims at the achievement of universal primary education by 2015. Secondly, South African government policies are currently targeting basic education for quality improvements. Erickson in Miles & Huberman (1994), maintains that sampling a research site should involve a generic, funnelling sampling sequence, working from the outside (e.g. primary school located in a poor area) in to the core of a setting (e.g. availability of orphaned learners in the school).

Qualitative case studies require setting boundaries in order to define aspects of the case that can be studied within the limits of the researcher's time and means and, that connect directly to the research questions (Yin 1994; Miles & Huberman 1994).

This particular school was identified by my aunt, a senior teacher and coordinator of the school's Social Development Committee.[6] I shared my research interest with her and she told me stories about learners at her school who were being raised in child-headed households and others that, although not orphaned, were neglected by their parents. She cited an incident where an eight-year-old girl was left alone during the week because her single mother had to look for work. As a teacher, she had to intervene in cases where learners were raped in their homes by either

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[6] This Committee was established in 2005 as a result of a directive from the Department of Education requiring schools to identify needy children, orphans and other vulnerable children for the purposes of providing school uniform, social grants and exemption from payment of school fees.

neighbours or stepfathers. As I listened to what my aunt shared with me, I realised that the school had orphaned learners who could provide information about the phenomenon under investigation. Marshall & Rossman (1999:69) maintain that a reality site is where
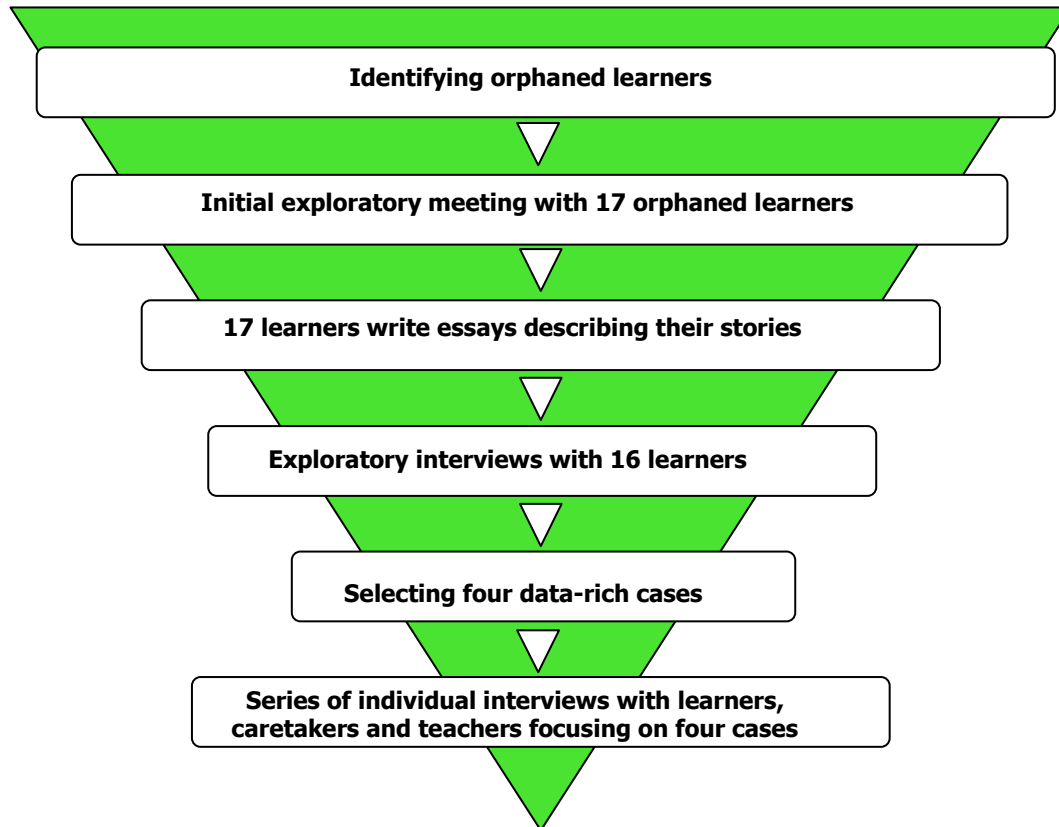
- entry is possible (a site may be appropriate and relevant to the phenomenon under investigation but if the researcher cannot gain access to the site and the population, the study will not succeed)

- there is a high probability that a rich mix of the processes, structures and people relevant to the study are present

- the researcher is likely to be able to build trusting relationships with the participants in the study

In May 2006, in order to gain access, I phoned the school to make an appointment with the principal with the aim of exploring the possibility of collecting data. On the day of our meeting, the principal gave me permission to conduct the study at the school and called in two teachers to meet me so I could brief them about the research. In addition, the principal made access even easier by arranging that I meet with all the teachers at the school so that I could tell them about my study. The teachers were also willing to help me identify the orphaned learners. It was apparent from my meeting with the principal and the teachers that this was a research site where I would be able to build up relationships of trust with the participants.

I then sought permission from the Gauteng Department of Education to conduct the study at the school. The letter of permission was received in June 2006 (cf. Appendix A).

4.3.2.2 The sampling process

Figure C: illustrates the process I followed in selecting the four data-rich cases

Identifying orphaned learners

Initial exploratory meeting with 17 orphaned learners

17 learners write essays describing their stories

Exploratory interviews with 16 learners

Selecting four data-rich cases

Series of individual interviews with learners, caretakers and teachers focusing on four cases

4.3.2.2.1 Selection of the participants

The Department of Education (DoE) requires schools to identify orphans and other vulnerable children for the purposes of support. At the current research site, two teachers who are members of the school's Social Development Committee mentioned that the DoE had ordered the school to identify vulnerable children for the purposes of exempting them from school fees, exposing them to social grants and receiving school uniform. These learners were identified with the help of their class teachers. Wilson *et al* (2002) point out that teachers are in regular contact with children in the classroom, which puts them in an ideal position to observe them for signs of distress. Teachers are also expected to keep records of absenteeism and monitor children who are absent for long periods of time. As such, teachers are in a position to draw on a range of techniques in order to facilitate opportunities for children to communicate their experiences.

In a similar study, Giese *et al* (2003: 196), in trying to identify learners who were either living with sick caregivers or who had been orphaned, found that very few schools that participated in their research had any kind of formal mechanisms for identifying orphans or vulnerable learners. Although some basic information about the children's circumstances was routinely collected by most schools at the beginning of the school year, this was limited to determining who would be responsible for paying school fees. In the absence of any formal identification mechanisms teachers use various strategies, such as setting essay topics that provide children with opportunities to talk about personal experiences, and using drawings and other forms of self-expression in the classroom to find out more about children's experiences and coping strategies.

In selecting the sample, the initial plan was to draw my sample from orphaned learners who were heading households from Grades 6 and 7. However, when I discussed my intended sample with the school principal and the two teachers on the Social Development Committee, they advised me to include learners in Grades 4 and 5 who also might be able shed some light on the problem. A qualitative research design requires flexibility and a tolerance for adjustment as the research progresses (Wiersma 1995:213). Teachers identified the following sample indicated in Table 2:

Table 2: The initial sample of learner participants

Grade	Number of learners	Age range	Boys	Girls
4	5	9-12	2	3
5	3	11	0	3
6	3	12-14	2	1
7	6	13-14	1	5

4.3.2.2.2 Initial exploratory meeting with orphaned learners

On 8 June 2006, I had my first meeting with all 17 orphaned learners identified by the school. I met with the learners in a classroom where two members of the Social Development Committee were present. My conversation with these children was conducted in the learners' home language.

One of the teachers introduced me and told the children that I would tell them why I was there. I then introduced myself to the learners and told them briefly about myself, where I grew up, and the schools and tertiary institutions I had attended. Finally, I told them about my current studies.

I told the learners that I was studying how orphaned learners experience schooling. In this study I would be asking them to tell me a story about themselves and, by being asked additional questions based on their stories, they would help me to understand their stories better. The reason I wanted them to talk about themselves in relation to their schooling experience was to help me understand their specific needs pertaining to schooling better.

Furthermore, I indicated that if they wanted to be part of my research they would have to spend some time with me answering my questions. However, if they did not want to tell me their stories and answer my questions, I would not be upset or disappointed. I assured them that I would not tell their teachers should they decide not to take part in this study. I guaranteed that whatever we talked about during my meetings with them would be kept private, meaning no one, not even their teachers or other learners would know what we had talked about. I also mentioned that I would not use their real names in my research report.

I also emphasised that if any of them felt that they wanted to take part in this research but later changed their mind, they were most welcome to do so, as I was not allowed to force them to continue with something they did not wish to be part of. I further pointed out that during my one-to-one meetings with them I would be using a tape recorder to record our conversation **only** if they allowed me to do so.

I then asked them individually if they would like to take part in the study and they all agreed. I told them that since they were primary school learners and were all under the age of 18, their guardians (whoever was taking care of them) had to give permission for them to take part in this study. I then handed out consent forms and explained the information on the form (cf Appendix B). I told them that they should talk to their guardians about my visit to the school and what I had told them and the reasons for signing the forms. I read each statement on the form and explained what each statement meant in their home language. If their guardians allowed them to be part of this study and they also agreed to be part of it, their guardians could complete the form. Once the forms had been completed they could hand them to any one of the teachers who were present in the classroom.

Lastly, I told them that if they had any questions about the study they were welcome to ask me or if they thought about something later they could write it down and ask me the next time I visited the school.

4.3.2.2.3 Second meeting with the learners

The second meeting with the learners, in August 2006, took place after the learners' guardians had returned the consent forms. I thanked the learners for their willingness to participate in the study and I reminded them that although they had indicated their willingness to participate, if any of them at any stage felt that they could not continue with the research they were welcome to withdraw and I would not tell their teachers or their guardians that they had done so.

At this meeting I told them that I would like them to write about themselves. I found choosing writing as opposed to drawing an appropriate method particularly with children who come from a schooling system that does not expose learners to different forms for expressing their ideas, for example using drawings to tell a story. I had initially considered drawing as a method for getting children to illustrate their stories, but I had recalled the time when I worked as an assistant

researcher and we had had to test our data collection methods. We were a group of black and white researchers and had to illustrate what we considered to be healthy food. At the end of the exercise I noticed that our white counterparts had all illustrated their food in the form of pictures while the black researchers had made a list of healthy food. Furthermore, during my schooling years I was not expected to represent ideas through drawing. I asked one of the teachers at the school where I was conducting my research whether the children were accustomed to drawing as a form of storytelling and she confirmed that asking them to draw would not be easy for them. Further, I agree with Jones & Tannock, in Lewis & Lindsay (2000), that writing is the main feature of children's primary school experience and that learners would find writing to be something they would normally be expected to do.

I indicated that before they shared their stories in writing, I would like to share my story with them. This was one way of establishing rapport with the learners and sharing my story served to exemplify how the learners could communicate their stories. In my narrative I focused on particular situations and events in my own life. For example, I described the family I grew up in; I recollected happy moments of living with relatives as one big family. Then I described a painful period in my life when my granny, the person I was most close to, died (cf. Appendix C).

This was followed by getting learners to share their experiences in writing. I gave each a piece of paper to write on and I told them to write in the language they felt most comfortable with. The majority of the learners chose to present their stories in English (cf. Appendix D), which was very unexpected, as I had thought that personal experiences would be best shared in the individual's home language. I also told the learners that those who would prefer to tell me their stories orally could approach me individually. I made this request because I had thought that younger learners in Grades 4 and 5 would not be able to express themselves in writing.

While the children were writing I stood outside the classroom to avoid creating an environment typical of a test or an exam. While I was standing outside, a Grade 6 learner approached me and told me that she could not tell her story because of a traumatic incident that had taken place in her home the previous night. She told me about the incident and I held her tightly and she started crying. I allowed her to cry while holding her and then asked her how she felt. She said that she was feeling fine and walked back into the classroom. I was able to handle this situation because of my training as a lay counsellor and having been involved in counselling for 10 years. Then a Grade 7 learner also came to tell me that her experience was so painful that she could not share it

orally or in writing. I told her that it would be fine if she was not able to take part in the writing exercise that day. I assured her that I would be visiting the school often and she could come and share her story with me when she was ready. I also reminded her that if she felt unable to continue taking part in the study, she was welcome to withdraw because her participation was voluntary. This learner did not participate in the individual interviews that followed.

4.3.2.2.4 Individual interviews with the learners

Following the written exercise with the learners, I arranged with the school to interview all 17 learners during August/September 2006. The reason I wished to interview all 17 learners was to identify the learners who would be able and willing to talk about their experiences and provide rich data about the phenomenon under discussion.

During the interview period only 16 learners were interviewed. I chose face-to-face unstructured individual interviews because they had the potential to give the participants the opportunity to describe personal information in detail and they also allow for an exploration of the meaning that participants attach to their lived experiences (Marshall & Rossman 1999). Secondly, as my study involved African children and given that African people come from a culture where stories are told orally, I assumed that interviews would allow children to share their experiences freely. Davis (1998: 331) contends that certain approaches may be appropriate as they relate to aspects of the children's cultures. Some children may come from backgrounds with verbal traditions and may not have the experience of, for instance, using drawing to narrate a story. In a study conducted by Amato & Ochiltree (1987) it was found that children from about the age of 7 have adequate verbal ability and understanding to talk about family life. A great majority of children from disrupted families were both willing and able to discuss sensitive issues relating to their family experiences.

Furthermore, Eder & Fingerson (2003:35) point out that one of the most important considerations in interviewing children is the creation of a natural context for the interview. The researcher can achieve this by avoiding creating situations that remind children of classroom lessons, where children are accustomed to questions being asked to get the correct answer, and also by refraining from adhering to the traditional question-and-answer mode. Interviewers should begin with an open-ended question to elicit a spontaneous narrative, and then use direct questions to fill in the gaps in the narrative (Docherty & Sandelowski 1999:178).

Given the pros and cons of the methods discussed above, I conclude that there may be no universally best research tool for obtaining children's views. Some children possess greater expertise in writing or drawing while others may be competent in verbal communication (Davis 1998: 331).

I spent five days at the school from 9:00 to 13:00 during August/September 2006, conducting the interviews. I was given a quiet place in the library to do the interviews and was able to interview the learners one after another. I interviewed the learners individually, using their written stories firstly as a way of starting off the interview and secondly as a way of broadening my understanding of their stories. This was followed by direct questions to fill in the gaps in their narratives. The interviews were audio-taped to enable verbatim transcription. Appendix E demonstrates how I used the learners' written stories during individual interviews.

4.3.2.2.5 Selecting four data-rich learners

I listened to the tapes and transcribed the interviews every day after each session. Only 14 of the 16 interviews were tape recorded. I did not record two interviews because the learners could not tell me more about their written text. Furthermore, their texts did not reveal much information either. I analysed the interviews of 14 learners, which helped me to identify four learners with rich stories that would enable me to answer the questions raised in 4.3. I analysed the stories of these four further and noted follow-up questions. I also noted that these four learners were being cared for in the following types of household: sibling-headed, uncle-headed and granny-headed households. I was interested in establishing how these different types of household affected the children's schooling experience.

Another reason for limiting my sample to four learners was to obtain in-depth qualitative information from each learner that would provide an opportunity for getting to understand in depth or to get a clear picture of each learner's schooling and home environment to understand how the home can impact on the inputs or resources provided by the government through schools.

Table 3: Background information on the four information-rich cases chosen.

Learner	Head of household	Learner background information
Thapelo	Uncle	Thapelo is an 11-year-old boy in Grade 4. His mother died when he was 9 years old. His grandmother took care of him and his siblings, but she passed away shortly after his mother's death. His father is alive but has abandoned him and his siblings. He lives with his 27year-old uncle who is blind, his brother and two sister in his late grandmother's house. The uncle is unemployed and depends on social grants.
Grace	Sister	Grace is an 11-year-old girl in Grade 5. This is her first year at the school. Her single mother passed away in 2005 and she now lives with her unemployed sister aged 19 and other siblings aged 15, 13 and 8. Her 19-year-old sister is the head of the household.
Foustina	Granny	Foustina is an 11-year-old girl in Grade 5. She lives with her 53-year-old grandmother who is a cleaner in a hair salon, and her 15-year-old brother. Both her parents died in February and April of 2006 respectively. She and her 15-year-old brother lived with both parents. Following her parents' death, she had to move from her parents' home to live with her grandmother in the old section of the township. .
Maria	Sister	Maria is a 12-year-old girl in Grade 7. She lives with her 23-year-old unemployed sister and her two other sisters aged 16 and 18. Her single mother died in 2003.

Following the identification of these four learners, I conducted individual interviews with the learners' class teachers. This was done at the school during their free periods. The purpose of interviewing these teachers was to gain a deeper understanding of the learners' schooling experiences.

After interviewing the teachers I interviewed the learners' guardians. This was done to fully understand and appreciate the context within which the lived experiences took place. These interviews were conducted at the learners' homes.

Patton (2002:556) contends that constructivists/interpretivists triangulate sources, meaning that they check the consistency of different data sources with the same method in order to capture and report multiple perspectives rather than seek a singular truth**.**

Follow-up interviews with the learners and guardians were conducted at the learners' homes. The follow-up questions are included in Appendix G.

4.3.2.2.6 Observational field notes

According to Yin (1994:87) there are various ways in which a researcher/participant observer can participate – from observing as an outsider, having casual interactions, to actually participating actively in the functional activities. The observation method I chose was unstructured, observing as an outsider. This type of observation is primarily concerned with writing about and explaining the phenomenon as observed. This method, although less structured, can provide insights about the phenomenon being studied. I chose observational field notes for the purpose of describing the settings, learner activities during school hours and the meaning of what I observed from those activities..

(a) *Observations at the school*

During the time I spent in the library conducting interviews, I did not observe any learners visiting the library which may suggest that it is being underutilised. I also observed that there was a limited number of reading books in the library. I then decided to donate some English reading books and school dictionaries to the school.

I also noted the provisions made for school safety in that the school yard is surrounded by a fence, the gate is kept locked and a security guard records all incoming and outgoing vehicles. Provision of safety and security is one of the quality education indicators by which schools are evaluated, as indicated in the National Policy on Whole School Evaluation discussed in Chapter 2.

I had the opportunity to observe and interact with the participating learners during school breaks and after school. I observed that some of the participants ate together during lunch breaks and would be standing or walking together after school which suggests friendship among orphaned learners.

4.3.2.2.7 Interviews at the learners' homes

I visited the homes of the learners over weekends during September 2006. Before my first visit, I informed the four learners that I would be visiting their homes and that they should inform their guardians and I phoned the guardians first to make appointments. Given that the learners' homes were situated on the outskirts of the township where there are no street names, I relied on the learners to accompany me from one house to another. On my first visit, I decided to use mini-bus taxis. The learner whom I had my first appointment with was waiting for me at the taxi rank so I could walk with him to his home. My first appointment was with Thapelo's uncle. On arrival I found the guardian (the uncle) plaiting a two-year-old girl's hair. To establish rapport, I firstly asked about the child whose hair he was plaiting.

Thapelo joined us during the interview. I introduced myself and explained why I was there. I reminded the guardian about the informed consent he had signed to allow the learner to participate in the study and I told him that I would require permission from him to interview him. I then explained the contents of the informed consent form which he later signed. I also told him that I had had an interview with his nephew, but did not disclose the content of the interview as learners were promised during our initial contact that the information they shared would not be divulged to anyone. I asked the uncle for permission to use the tape recorder, which was granted. I then asked him a single question: *How do you experience raising Thapelo?* I then probed for clarity and additional information.

On the same day, I visited the homes of the three other learners.

Observations at the learners' homes

When I visited the learners' homes, I observed that three of the homes were made of corrugated iron. These were big single-roomed homes partitioned with either cardboards or old curtains. All the homes visited had electricity, running water and an outside toilet. These single-room dwellings are inhabited by four to five family members.

Although these homes had electricity, there was no television set, radio or books. However, one learner's home, which is located in the old section of the township, is built of brick. This is a four-roomed house with two bedrooms, a kitchen and a dining room. In this home there was a television and a hi-fi set.

Such observations are important because they give deeper insight into the socioeconomic background of the learners being studied. As mentioned in Chapter 2, understanding the geographical context and the cultural setting is important in defining quality in education.

4.3.2.2.8 Document review: Acts, White Papers, Policies and school documents

I reviewed the National Acts, White Papers and policies linked to quality education in South Africa (cf. Chapter 2.1). The purpose of analysing these documents was to understand what government perceives quality education to be. There did not appear to be any need to doubt the general validity of these documents and I felt comfortable making inferences based on them (Yin 1994:85).

Furthermore, I reviewed the School document referred to in Chapter 1, which gives the history of the school.

4.4 DATA PROCESSING AND ANALYSIS

In the analysis of narratives, the researcher identifies common features derived from various sources in order to define them as belonging to a broader category. The aim of the analysis is not only to identify and describe categories but also to describe the relationship between categories (Polkinghorne 1988:177). By pointing out features that different experiences have in common one can construct cognitive conceptual frameworks (Smeyers & Verhesschen 2001:76). In the

analysis of learner data, I not only considered data from the final sample but I was also interested in identifying common themes emerging from the narratives of other learners interviewed. According to Polkinghorne (1988:167) working with a number of stories allows the researcher to produce a description that includes comparisons and contrasts in the story under consideration and between this and other stories.

The first step I undertook during the process of joint data collection and analysis of data was to examine the data contained in the transcribed interviews of 14 of the 16 learners interviewed. The mode of data analysis I found to be most appropriate to my study was the one described by Lieblich, Tuval-Mashiach & Zilber (1998), namely, the categorical-content approach, which is also known as content analysis. According to this approach the original story is broken down into sections; sections belonging to a defined category are collected from an entire story or from several texts belonging to a number of storytellers. Categories of the studied topic are defined and separate utterances of the text extracted, classified and gathered into these categories. I adopted this approach as I was interested in examining themes emerging from the narratives of individual learners, as well those emerging from the orphaned learners as a homogeneous group.

I used open coding by highlighting and labelling selected sections of text that were meaningful and assigning codes to those sections as well as recording my reflections to the assigned codes (cf. Appendix F). Open coding assisted me in identifying relevant codes and establishing the meaning of the words, phrases or utterances. Miles & Huberman (1994:56) contend that it is not the words or phrases that matter but the meaning attached to them. After writing down all the codes I grouped the emerging categories together, thereby presenting the themes constructed from the data codes.

Since, in qualitative research, data collection and analysis occur concurrently (Wiersma 1995; Marshall & Rossman 1995), after analysing data from 14 learner interviews, I selected four learners for a longer-term involvement in the form of a series of interviews with them, their guardians and teachers with the aim of saturating the data. The follow-up interviews were conducted over weekends at the learners' homes (cf. Appendix G). These four learners formed the main source of data from which their lived experiences in terms of education were reconstructed. In addition, themes that emerged from the analysed data obtained from the 14 learners formed part of the study findings.

I extracted and classified separate utterances of text from the transcribed interviews with the learners, teachers and guardians into categories or themes (Merriam 1988).

Polkinghorne (1988:177) contends that the aim in the analysis is not only to identify and describe categories but also to describe the relationship between categories. Similarly, Glaser and Strauss (1967:106) argue that while coding an incident for a category, one should compare the incident with others previously coded in the same category before coding further. During the process of coding certain categories emerged quickly from the comparison of guardian, educator and learner data. The constant comparison of incidents soon starts to generate the theoretical properties of the category. As the categories and their properties emerge, the researcher discovers two kinds of categories, namely, researcher-created categories and categories that emerged from the words and phrases used by the participants.

4.5 Enhancing the credibility and trustworthiness of the study

According to Lincoln & Guba (1985) the philosophical assumptions and approaches underpinning a qualitative study require different criteria for judging the credibility and trustworthiness of the study. They argue that constructivist and interpretivist inquiry require criteria such as *credibility* (internal validity), *transferability* (external validity), *dependability* (reliability) and *conformability* (objectivity).

In order to enhance the credibility and trustworthiness of the findings in this study I employed the following strategies:

Triangulation

Triangulation provides diverse ways of looking at the phenomenon and also adds to the credibility of the study by strengthening confidence in whatever conclusions are drawn (Patton 2002:556). In order to enhance the credibility and trustworthiness of the findings I triangulated data collection methods and ensured convergence of the data collected from the orphaned learners' written texts, the interviews with the learners, teachers and guardians, and observations at school as well as in the learners' homes to form themes and subthemes (Cresswell 2000). Yin

(1994:79) maintains that it is important for data collected from different sources to converge on the same set of findings.

Patton (2002:556) advises that different kinds of data may yield different results because different types of inquiry are sensitive to different real-world nuances. Thus, understanding the inconsistencies in findings across different kinds of data should not be viewed as weakening the credibility of results but rather as providing opportunities for deeper insight into the relationship between the research approach and the phenomenon. It is likely that different kinds of data may have captured different things and so the researcher needs to understand the reasons for the differences. In the process of comparing and contrasting data from the various sources, I was able to detect some discrepancy in the statements made by the guardian and the teacher, wherein the guardian indicated that the learner did not miss school whereas the teacher mentioned that the guardian is the main reason for the child's absenteeism. It would seem that the guardian felt that if he admitted that the child missed school, he would have to account for the child's absenteeism. Patton (2002:560) argues further that either consistency in overall patterns of data from different sources or a reasonable explanation for differences in data from divergent sources can contribute significantly to the overall credibility of findings (Patton 2002:560).

Providing an audit trail

One of the techniques used in this study to account for the dependability of findings is to provide an audit trail (Lincoln & Guba 1985:301). Merriam (1998: 207) points out that in order for an audit trail to be created, the researcher must describe in detail how data were collected, how categories were derived and how decisions were made throughout the inquiry. To enhance the dependability of the study, I provided an audit trail in terms of tape recordings of interviews with learners, guardians and educators, interview transcripts with verbatim accounts of the participants' perspective, observational field notes, and analysis products including codes used during data analysis. Seale (1999:148) asserts that including verbatim accounts of what people say rather than the researcher's reconstructions enhances the dependability of the study.

An audit trail provides data collection and data analysis procedures and enables the researcher to check and recheck the data throughout the study to identify potential bias, distortion of research findings and alternative explanations (Marshall & Rossman 1999). Furthermore, I have provided

details on the process followed in selecting orphaned learners, the data collection and the analysis to enhance the confirmability of the findings. The appendices included in this thesis provide a trail of evidence of the research process and the decisions made.

Thick and rich descriptions

According to Ponterotto (2006:543) "thick description" refers to the researcher's task of both describing and interpreting observed social action within its particular context. The context can be African orphaned learners living in a poor community. "Thick description" accurately describes observed social actions and assigns purpose and intentionality to these actions, by way of the researcher's understanding and clear description of the context under which the social actions took place. Furthermore, "thick description" captures the thoughts and feelings of participants as demonstrated in the next chapter.

This study includes thick, rich descriptions of the learning experiences of African orphaned learners. Such thick descriptions allow an understanding of the context in which policies on educational quality are implemented and give a vivid picture of the phenomenon. In addition, I complemented this description with a theoretical base, the sociocultural theory. The evidence is thus derived from the data collected and triangulated, and from theory that explicated and explained the data (Henning, van Rensburg & Smit 2004).

Lincoln & Guba (1985:302) argue that it is not possible to understand any phenomenon without reference to the context in which it is embedded. It was advantageous for me to collect data from the very township I grew up in because I was familiar with the township lingo used during interviews and informal conversations with the participants.

Furthermore, "thick descriptions" are useful in that they enable readers to make decisions about the applicability of the findings to other settings or similar contexts (Cresswell & Miller 2000:129).

4.6 CONCLUSION

This study was designed to explore and understand sociocultural factors that impact on the intended quality of education. I approached the case study from an interpretive-constructivist perspective using multiple methods of data collection. I ensured the credibility and trustworthiness of my study by providing thick descriptions of the case, by using multiple methods of data collection and by leaving an audit trail.

CHAPTER 5

THE LIVED EXPERIENCES OF ORPHANED LEARNERS IN RELATION TO SCHOOLING

5.1 INTRODUCTION

The main purpose of this chapter is to present the empirical data generated from the exploratory question: *What are the lived experiences of orphaned learners in relation to schooling?* The intention is to infer from the data gathered on learners' lived experiences of the quality of education received. The lived experiences of these learners should be understood within the context of the relationship between the school and the home environment. In Chapter 3 of this study, I discussed the importance of the African family structure and the community as potential resources for supporting the learning process of the orphaned learner. Furthermore, research and government policies and legislation, such as the White Paper on Education and Training of 1995; Whole School Evaluation, 2002, the South African Schools Act 84 of 1996, have all stressed the role of the home in ensuring quality education.

As indicated in the previous chapter, I approached seventeen orphaned learners and explained the study. I then invited them to share their experiences in written and oral form. Of the seventeen, four learners were selected for longer-term involvement in a series of interviews with them, their guardians and their teachers with the aim of saturating the data. The data obtained from these four learners are the main source from which lived experiences in terms of education will be reconstructed; where necessary additional data will be integrated from the other learners' stories.

The process of data analysis involved reading through each of the four learners' reconstructed data, which integrated the learner's written story, the interview transcripts from the teachers and guardians, the perusal of phrases and sentences to identify relevant codes and to establish the meaning of various words and phrases. Miles & Huberman (1994:56) contend that it is not the words or phrases that matter but the meaning attached to them. After identifying and writing down all the codes, I grouped the emerging categories together to present the themes constructed from the data codes.

5.2 THE STORIES OF THE FOUR ORPHANED LEARNERS

In this section I present the constructed narrations of each learner supported by verbatim quotations; each narration is then followed by the themes indentified in that narration. Since two of the learners who are being raised in sibling-headed households share similar experiences, I present their stories first followed by a discussion of the common themes identified. The degree to which the emerging themes are corroborated in the literature on orphaned learners was also indicated. Since the data are mainly extracted and distilled from the data-rich cases of four learners, the degree to which the identified themes coincide with data obtained from the other learners interviewed will be indicated. This process was undertaken in order to describe the lived experiences of orphaned African learners and to infer how their experiences impact on their schooling.

I present the stories of orphaned learners raised in the following types of household: a granny-headed household, an uncle-headed household and two sibling-headed households.

Foustina's story

"*I remember my father a lot when I see other children playing with dolls, my heart feels sore. When I see other children walking with their dads, my heart feels sore*"

Foustina is 11 years old and is in Grade 5. Once upon a time she lived with her mother; father and brother, now aged 15, in the low-cost housing section of a Pretoria township. Foustina's and her brother's lives were changed when their father became ill: "*He carried on being sick and we would go and visit him* [in hospital]. *One day I went to see my dad in hospital my dad and mom were crying. My heart broke.*" Her father later died. "*My mother said I should stop worrying, we also are going to follow him. I said to her: 'Don't leave us, me and my brother. She said she won't do that*". However, following the death of her father, her mother became ill and later passed away.

After the death of her parents, Foustina and her brother went to live with their grandmother in another section of the township. The grandmother mentioned that Foustina's parents' house had been very close to the school, but now it takes Foustina over an hour to walk to school, as her grandmother cannot afford public transport. Foustina's grandmother also mentioned that in the

morning the children leave for school without having breakfast because they are always running late.[7]

Foustina's grandmother struggles to pay the R100 per annum needed for school fees. She confirmed that her situation has changed since her grandchildren came to live with her:

> *Because these kids used to stay with me over weekends. So but now because it is permanent I just say God will help me raise them. God will help me because when their parents were still alive it was much better because they were there to take care of them but now they're looking up to me. There's nothing I can do because their parents have both passed away. In December I used to buy them things for school, but now it is difficult.*

Foustina's grandmother is a cleaner[8] at a hair salon. She would like to retire but she cannot do so because she has to provide financially for her grandchildren. She also mentioned that she has to pay for municipal services for *two* houses, the one she is living in with the grandchildren and the house where the children used to live with their parents. She has to continue taking care of the two houses because: "*At extension 7 where my son used to live I must take care of the house because before their father died he said he is leaving the house for his son* [The son is 15 years old]. *So I have asked my sister's child to stay there for a while because the children are still young to own the house.*"[9]

During the interviews, Foustina talked about how her mother had created a pleasant environment in their home:

> *She used to joke, she used to laugh a lot, we would not get bored, they were planning to buy us a computer this year. Life used to be nice for the four of us. But now I get bored, I remember them a lot at times I see her face when I am sleeping and look up I see them together, my mother and father.*

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[7] Given the financial situation of the family, it is possible that the grandmother may not have the financial resources needed to provide a regular breakfast for the children.

[8] Cleaners often earn the minimum wage prescribed by law, which may be R1 200 per month. Transport costs take up a large percentage of this and people are left struggling to make ends meet.

According to African tradition, a person's death wish must be honoured otherwise the spirit of the deceased may come back to trouble the living relatives. Added to this, in terms of African tradition, the land or property is passed on to the eldest son. Njoh (2006) points out that a common thread running through traditional African law is that neither land nor property can be sold, but it is passed from one generation to the next. Thus the granny in this study would have to continue carrying the financial burden because she has to adhere to tradition.

She described her father as someone who provided for their everyday needs. She longs for her father:

> *My father loved us the most because he used to buy us clothes; he used to buy groceries he used to do everything for us. I remember my father a lot when I see other children playing with dolls, my heart feels sore. When I see other children walking with their dads, my heart feels sore.*

Her parents emphasised the importance of schooling:

> *They said I must not stop attending school because schooling in most cases …. My friends neh I will learn from my friends. But when I get to another school I should not follow what my friends say because most friends will lead you astray. My mother said school is more important than many other things. She said I must not leave school. I said I will not leave school even if I fail. She said I must study hard.*

She also mentioned that her parents used to help her with her homework. Her mother assisted her with Zulu and other subjects while her dad helped her with Maths. Since the death of her parents, their neighbour help her with Zulu, her brother helps her with other subjects when she cannot manage on her own and her uncle assists her with Afrikaans.

Foustina mentioned that sometimes she thinks about her parents when she is in class. She said:

> *I don't think about them a lot but there are times when I think about them and my teacher will call me and will ask why am I this quiet and I will tell her I am thinking about them and Ma'am will say I shouldn't think about them a lot because there's work to be done. I will go sit down and my friends will play with me to help me forget.*

She also indicated that she receives emotional support from her friends:

> *They feel sad and feel sorry for me. Portia lost her father and when I think about my parents her heart becomes sore (too). They will bring me a bottle of water[10] and tell me not to worry. One day they said "sorry"[11] and I cried. So they bring me water and tell me not to worry and play a game with me.*

Foustina's relatives performed post-funeral rituals to help her cope with grief. She related them in this manner:

> *After the 10 days of cleansing ceremony, we stopped worrying about them* [parents who have passed away] *and forgetting about them. I don't think about them a lot but there are times when I think about them. I don't know but I used to wear red and white beads,[12] my uncle removed them and he said they must take it somewhere. Yes, it helped me forget… my uncle is a traditional healer. They took them* [beads] *somewhere and this made it forget because I could not eat. When I try to eat I just become full and I don't know what makes me full even when I play I feel tired at home they said when I feel tired I must rest.*

When I asked Foustina about her school work she said: *I do my homework and class work and I take notes. Yesterday I didn't come to school but I finished Afrikaans, Social Science, Maths and Technology homework.* Her teacher described her as an outspoken child who attends school regularly. Her teacher said: *"Sometimes there is that disturbance but she can cope because she is outspoken and her work did not deteriorate. She is just fine and she has initiative. It's such a joy to teach her I wish all kids would be like her."*

Foustina wishes to travel to America, drive a fancy car and protect her family and her children when she grows up.

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[10] In the African community when someone is overcome by emotion elderly people would bring the person water mixed with sugar to calm the person. The children must have learnt about this practice from their elders because I have observed my grandmother, mother, and aunt doing the same thing.

[11] It is common practice among the black community to say "sorry" if someone is hurt even if it was not their fault.

[12] Some of the African communities in South Africa believe that when the parent(s) die, the youngest child in the family should wear beads around their neck to prevent illnesses resulting from grief and to help the child not to keep thinking about the deceased.

5.2.1 Emerging themes from Foustina's story

The following themes emerged from Foustina's story: relocation to a different environment; dealing with increased levels of poverty; emotional changes experienced as a result of changed family circumstances; support for learning; cultural practices for dealing with grief; peer support; and educator response to the needs of orphaned learners.

5.2.1.1 Relocation to a different environment

The relocation of Foustina to her granny's house meant that she had to walk a long distance to school, whereas in the past it only took her 15 minutes to walk to school from her parent's home. Furthermore, because Foustina always runs late in the morning, she has to walk this distance without having had breakfast. Chinapah *et al.* (2000) point out that the distance that a learner travels to school affects the extent to which the learner can take advantage of the schooling opportunities available to him/her. The distance to school, as measured by time travelled, may have an effect on the time a learner can spend at school. Furthermore, such learners may arrive at school exhausted and hungry and this affects their ability to concentrate in class. In Foustina's case, although the school provides meals for learners before school starts, that is, before 7:45, it does not make allowances for those learners like Foustina who arrive late. Sometimes certain learners do not get food because by the time they arrive at school the food is finished and they miss this important meal of the day.

The introduction of a School Nutrition Programme by the school is part of the government's attempt to foster better quality education. The White Paper on Reconstruction and Development (1994:46) describes the aims of the School Nutrition Programme as follows:

> *To contribute to the improvement of education quality by enhancing primary pupils' learning capacity, school attendance and punctuality and contribute to general health development and alleviating hunger. Educating pupils on nutrition and also improving nutritional status through micro-nutrition supplementation.*

5.2.1.2 Increased levels of poverty

It appears that when orphans are taken in by grandparents who are already impoverished, children experience challenges in that poverty levels increase. For example, Foustina described her father as a parent who used to provide for their material needs. She mentioned that before her parents died they were planning to buy them a computer, which suggests that although her parents lived in a low-cost house provided by the government, they were in a financial position to provide resources such as a computer. Furthermore, her father used to provide clothes, food and toys which the grandmother cannot continue to do, moreover the grandmother struggles to pay R100 per annum towards school fees and also does not have the financial resources for public transport for her grandchild. During an interview with the grandmother, she indicated that she did not receive a child support grant for the children because she was in the process of changing their current surname to that of their father. As the granny indicated, "*God will help me because when their parents were still alive it was much better because they were there to take care of them but now they're looking up to me*".

It appears that when families take on orphan care-giving responsibilities without additional income, financial difficulties increase. These difficulties lead to shortages when paying for basic needs such as food, shelter, water and transportation (Heymann & Kidman 2008:1).

5.2.1.3 Emotional changes experienced as a result of changed family circumstances

It appears that before Foustina became orphaned, she lived an emotionally and physically fulfilling life as described in her narrative. She imagines seeing her parents together: "*I look up and see them together, my mother and father*", suggesting a longing for her parents. Foustina longs for the pleasant atmosphere created by her mother through jokes and laughter and the material needs that she is now deprived of, such as the clothes, food and toys which her father used to provide. She experiences emotional pain when she sees other children with their fathers and playing with dolls, which suggests that she is deprived of emotional attachment and material provision. In a similar study, Ogina (2008) observed that orphaned learners often associate the longing for their parents with the needs they have been deprived of.

In a study conducted in Kampala, Sengendo & Nambi (1997) revealed that after the death of parents, children undergo emotional changes – from being happy, relaxed and feeling good because they were eating well and going to school, to being sad, angry, scared and helpless. They further point out that these emotional changes affect both the physical and emotional well-being of children, as they pose new demands and constraints on the children's lives. These emotions

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affect the children's ability to concentrate in class resulting in poor academic performance. Although Foustina's concentration in class was sometimes affected by the loss of her parents, this does not appear to have affected her academic performance. As her class teacher confirmed: *"Sometimes there is that disturbance but she can cope because she is outspoken and her work did not deteriorate."*

5.2.1.4 Support for learning

In her narrative, Foustina indicated that her parents used to help her with her school work and encouraged her to continue with school, suggesting that her parents valued education. Her grandmother continues to support her learning by asking their neighbour to help her with homework and by encouraging her to focus on her studies. Her grandmother encourages her in this way: *"My grandmother she said we must stop thinking about them* [parents] *a lot and concentrate on our books because if we continue thinking a lot about them we are going to fail."*

Although the above statement shows that the grandmother is concerned about her grandchildren's performance at school, it may also suggest that the grandmother does not know how to handle grieving children. In her study, Ogina (2008) noted that some orphans may be going through the process of grieving on their own because the main caregivers do not know how to relate to or support a grieving child.

Nonetheless, parents (including grandparents and particularly grandmothers) play a role in instilling motivation and positive attitudes in their children and such qualities have a positive effect on school performance (Stevenson & Baker 1987:1349). It appears that even though Foustina has lost both parents, the cultural practice of assigning children to a close relative to act as a surrogate parent means that the child retains a family relationship that may be more beneficial to the child's educational experience than being placed in a foster home or an orphanage. Brown, Cohon & Wheeler (2002) point out that kinship care, unlike foster care, provides protection, care and stability for these children. Children who are cared for by relatives may escape the risks of disruption that foster children face because of continued contact with family which provides consistency and support. Such a situation minimises the disruption children may experience when moved from their parent's home. In a study conducted on the role of the family in the academic achievement of male African American youth, the participants mentioned, among other things, the love and support received from their parents as contributing to their academic success (Maton, Hrabowski & Greif 1998). This

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suggests that close relatives, particularly grandmothers and aunts, provide orphaned learners with emotional support and may have a positive effect on their academic performance. The extended family appears to be a resource that should be tapped in order to provide orphans with attachment and stability.

5.2.1.5 Cultural practices of dealing with grief

In her story, Foustina shared the way a cultural practice of wearing red and white beads helped her cope with the double tragedy of losing both parents. This child attributes her ability to cope with grief to the performance of this ritual, suggesting a belief in cultural practices. This implies that one of the characteristics that learners bring to the teaching and learning situation is their cultural ways of dealing with grief. Castle & Phillips (2003:60) point out that performing grief rituals facilitates positive outcomes in that they develop a greater sense of confidence in the grieving person's ability to deal with grief. This statement suggests that schools should take into account the richness of knowledge that learners bring with them to the classroom. This is the kind of knowledge that Moll & Greenberg, in Moll (1990:323), refer to as "funds of knowledge". As indicated in chapter 3, funds of knowledge refer to specific knowledge of strategic importance to the household (ibid.). This knowledge is central to home life and to families' relationships with others in their community. In the same vein, Lim & Renshaw (2001:15) point out that "learning and teaching must not disconnect individuals from their social and cultural contexts but consider them within and provide them a voice to speak from their cultural spaces and frameworks of relationships and communities".

5.2.1.6 Maintaining a relationship with the deceased

Foustina experienced some sort of contact with her deceased parents in a dream. She said this: "*My mother and father came to me last night and told me that everything is okay, and I say what are you talking about and I wake up and I say what is this.*"

Such notions can be comforting for the child and through such dreams the child remains connected to the deceased. Silverman (2002:451) points out that, when death occurs, more than a life is lost: a relationship is broken yet such a relationship does not end with death, as people find new ways of remaining connected to the deceased. This contact with the deceased confirms the point that Nabudere (2008) raises, as mentioned in Chapter 3, about African philosophy – that

Africans believe that the dead continue to exist in spirit form and as such they are recognised as the living-dead or ancestors.

The cultural beliefs espoused by these learners have significant implications for the curriculum and for classroom practice. The educator as mediator of learning could construct learning environments in which learners share cultural beliefs and practices in the classroom thereby building on their personal and cultural knowledge. It is through attempting to understand the culturally conditioned knowledge that learners bring to the classroom that schools can begin to appreciate, value and build on this unique experience (John-Steiner & Mahn 1996:202). In a similar manner, Moll and Greenberg, in Moll (1990:344), contend that valuable knowledge exists outside the classroom and if organised for academic learning it can transform classrooms into more advanced contexts for teaching and learning.

5.2.1.7 Peer support

Foustina's narrative reveals that children have acquired ways of helping their peers deal with grief. For example, the practice of giving their friend water, playing with her and showing feelings of empathy and sympathy suggests that peers play an important role in the emotional support of orphaned learners: *"They feel sad and feel sorry for me. So they bring me water and tell me not to worry and play a game with me"*. This utterance demonstrates compassion and caring from fellow learners, which Broodryk in Olinger, Britz & Oliver (2004), identifies as core values of ubuntu.

Similarly, Leatham (2005) found that adolescents from child-headed households make use of friends and peers for emotional support. This implies that having a peer group as a support structure may contribute to quality education in the lives of orphaned learners.

Foustina's relationship with her peers may not be the norm, however. Some orphans appear to be isolated by their peers. One of the teachers pointed out an orphaned learner who was being isolated by her friends.

> *Looking at Refiloe you can see that there is problem there especially these days you know with kids sometimes the friendship is just for that moment, friends tend to isolate her. I'm*

still trying to study her to understand what is happening but when it comes to school work her performance has dropped drastically.

Although in my interviews with the learners none of them mentioned rejection or isolation by friends or other learners, feelings of rejection could affect learners' academic performance. In a similar study, Ogina (2008) found situations in which orphaned learners felt isolated (e.g. being unable to pay for or go on a school excursion or not having food during break when others do).

5.2.1.8 Educator response to the needs of orphaned learners

Foustina's story revealed that when she displayed emotions of grief, her teacher discouraged them and told her to focus on her school work. " … *when I think about them and my teacher will call me and will ask why am I this quiet and I will tell her I am thinking about them and Ma'am will say I shouldn't think about them a lot because there's work to be done.*" This shows that although the teacher may be able to see that something is amiss, she lacks the knowledge to deal with the problem appropriately. Sengendo & Nambi (1997:106) maintain that psychological problems are not always easy to identify and that teachers lack training in identifying and addressing such problems. Similarly, Ogina's (2008) study indicates that teachers may be unable to respond appropriately to the emotional needs of orphans because they may not have been trained to deal with learners with special educational needs.

Foustina's teacher mentioned that she provides for orphaned learners' material needs and that she relates to them in a special way:

I mean even in class they know that I am a bit soft towards her, I bring her clothes, I bring food I mean I am just open in class they know I give them [orphaned learners] *first preference. In fact she is not the only orphan in my class. I give attention like when they don't have a pen I give them so other children also when they don't have pens they look me in the eye asking for a pen.*

She also helped Foustina to register with a community organisation known as Heartbeat[13] so that her family can receive food parcels. The fact that the teacher brings Foustina food and clothes,

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[13] Heartbeat is a nonprofit organisation working with orphans and vulnerable children in communities to alleviate the plight of these children. The organisation aims to give these children holistic support by not only providing for their basic needs but also attempting to meet their emotional needs and give them psychological support (UNISA 2005),

helped her to access food parcels and that she is a "*bit soft with orphaned learners*" suggests that she recognises that these learners need physical and emotional support and attempts to meet those needs. This observation is consistent with Schierhout *et al.*'s (2004) finding that educators provided food for needy children by either bringing food from home or giving them money to buy food.

The findings in this section have implications for the various roles that teachers are expected to fulfil, as outlined in two government policies, namely, the Norms and Standards for Educators (2000) as well as the Revised National Curriculum Statement Policy (2001). For instance, the Revised National Curriculum Statement Policy envisions teachers who are qualified, competent, dedicated and caring; furthermore, the policy document claims that educators should be able to fulfil the various roles outlined in the Norms and Standards for Educators which include the pastoral role. Furthermore, they are expected to offer counselling, and/or tutoring for learners in need of assistance with social or learning problems. This issue will be discussed in more detail in the next chapter.

Thapelo's story

"I wish at home we had money for clothes and food."

Thapelo is 11 years old and is in Grade 4. His family lives in an informal settlement on the outskirts of a Pretoria township in a house built of corrugated iron. Before his mother and grandmother died, his family comprised his mother, father, younger brother and sisters, granny and uncle. The house they live in belongs to his grandmother. He said that when he was in Grade 1, he loved to play soccer but had to stop playing because his family could not afford to buy him soccer boots. His mother died in 2004. He said this about his mother: "*I loved my mom, she used to take good care of me. When she had money she would buy us what we need, she would buy food.*"

After the death of his mother, his grandmother took care of them; however, granny died a year after the death of his mother [2005]. Thapelo did not cope well with the death of his mother. His uncle said:

> *Thapelo was really troubled by the death of his mom. They used to call my mom time and again at school to tell her that Thapelo has changed, his performance has deteriorated.*

He got into drugs, I tried to speak to him but this did not help. I have friends, counsellors I made sure that I meet with counsellors at LifeLine. I took Thapelo there for counselling. They counselled him and he was better. Last year he failed Grade 4 and he is repeating the grade. I keep going to school to ask about his performance in class. I was told that he has improved it's not like last year after his mom died.

His teacher confirmed that, compared to the year that his mother passed away, she sees an improvement: *"This year* [2006] *he is doing well, I see the difference between last year and this year."*

After the death of his grandmother, his uncle who is 27 years old and is blind took over the guardianship of the children as Thapelo's father had abandoned them after the death of their mother. Thapelo says this about his father:

My dad used to live with us but he went away. He used to be with my mom but they separated. He used to buy us what we need but now he doesn't care about us because at times when I go to him I don't find him , sometimes he will tell me to go back home he does not have money.

When I interviewed Thapelo, he was living with his uncle, his brother aged 9, and two sisters aged 7 and 3. His uncle is unemployed and the family depends on social grants[14] and monthly food parcels from a community organisation called Heartbeat. His Grade 4 class teacher mentioned that Thapelo has been registered with Heartbeat since Grade 2 through the help of his Grade 2 teacher. Thapelo said that he participates in the School Feeding Programme only "*when there is no bread and no money at home*".

His teacher describes him in this manner:

He is a nice child it is just that he is so naughty that I wish there was an adult who could say this is right and this is wrong. He comes to school neat unlike other children. He washes and comes to school clean. In class he is talkative and very naughty. I was his

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[14] Between 1998 and 2002 a social grant, specifically the Child Support Grant, was provided for children from birth to six years of age to support the care of poor children. In April 2005 the grant was extended to children of 11, 12 and 13 years of age. The primary caregivers can receive the grant for children in this age group and below if, for example, they live in an urban area in an informal dwelling and earn less than R1 100 per month or live in a formal dwelling and earn less than R800 a month (Antilla et al. 2006). This means that all learners in my study would quality for this grant

class teacher last year and this year. This year his books looks good he answers questions in class. I know his home background. His uncle keeps coming here, he is blind he is led by him (Thapelo). Last week he missed school the whole week. When I looked at the doctor's letter it seems his uncle had an eye problem. So, Thapelo had to take his uncle to hospital. He leads him wherever he goes, even going to meetings, Thapelo has to go with him. I have known him since Grade 3; he has been his uncle's guide since Grade 3. He is repeating Grade 4. Last year his performance was not good. This year there's some improvement. I retained him for that reason. His uncle told us that we should not be afraid to reprimand him because he can't see and he lives with him.

Thapelo mentioned that he had failed Grade 4 because he was not serious about his school work. He has lots of friends; they play games together and sometimes after school they read to other children who are in the lower grades.

The teacher described Thapelo's family background as follows:

When I asked Thapelo about who cooks for them, he said his uncle cooks for them. He tells his uncle that the pot is now on the stove and he holds his hand and directs him what to do. When he wants to go somewhere Thapelo has to hold his hand and guide him. If there's a meeting at school he will come holding his uncle by the hand. Everywhere he goes Thapelo is there. He misses school because he has to take his uncle somewhere. He acts like a parent and he is used to it now. He has assumed an adult role and he is still a child. When I ask him about the washing he said his uncle does that. He (Thapelo) pours water and soap and the uncle will wash their clothes. I asked him so, how does he hang the washing, Thapelo does that. I asked him what happens when you are at school and he is left alone at home. He said no, he stays at home. You know he has a sister in Grade 2; I asked who bathes her sister and he [Thapelo] *does that.*

When I asked the teacher if Thapelo felt tired in class, she said: "*No, he does not have problem. He started this a long time ago and now he is used to doing it*". The teacher confirmed that Thapelo does his homework regularly, as he completes his homework at school before he leaves for home. Sometimes his sister and uncle help him with homework.

Thapelo's wish is to live in a home where there is money for food and clothes.

5.2.2 Emerging themes from Thapelo's story

Themes emerging from Thapelo's story include the need for food and clothes, the effects of parental death on learner behaviour, support for learning, feelings of rejection, behaviour in class and responsibilities at home.

5.2.2.1 Need for food and clothes

Thapelo's wish is to live in a home where there is money for food and clothes. He also mentioned that what he misses about his mother is that when she had money she would buy them food, suggesting he is being deprived of basic needs such as food and clothing. Furthermore, the fact that Thapelo's family live in an informal settlement, in a dwelling built of corrugated iron, and that the family depends on food parcels provided by Heartbeat as well as social grants received from government, shows that the child lives in poverty. Brooks-Gunn & Duncan (1997) define income poverty as a condition of not having enough income to meet basic needs of food, clothing and shelter. They further point out that living in neighbourhoods with high concentrations of poor people is associated with less provision of learning experiences in learners' homes, which is true in the case of Thapelo's home.

In the same way, Christie (2008) contends that poverty has adverse effects on children's learning experiences and on their learning outcomes. Children from poor families often go to school hungry, are poorly nourished and come from households where there are no school-related resources such as books or adults who can read to them or supervise their school work. These factors influence the benefit they derive from schooling including their learning.

5.2.2.2 Effects of parental death on learner behaviour

Thapelo's story reveals that orphaned learners may engage in destructive behaviour such as using drugs because they are unable to cope with the pain of losing their parents. When I asked Thapelo why he took drugs he said that it felt good to be dizzy, meaning that he did not want to face the reality of his mother's death. This behaviour impacted so negatively on his performance at school that he failed Grade 4. This finding confirms Makame *et al*.'s assertion in Nyamukapa, Foster & Gregson (2003:26), that the loss of a mother has detrimental effects on a child's education because of the loss of the love, warmth and nurture provided by mothers.

Another form of behaviour displayed by Thapelo is absenteeism. His teacher mentioned that he is often absent because he has to accompany his uncle to hospital for regular treatment, which would have been Thapelo's mother's or granny's responsibility in the past.

5.2.2.3 Responsibilities at home

Thapelo's teacher indicated that he assumes a number of responsibilities at home, such as helping with the cooking and washing and bathing his younger sister. Added to this, Thapelo has to accompany his uncle to school meetings and to other places. These responsibilities reduce the time that Thapelo can spend doing his school work. Boler & Carroll (2003) argue that increased responsibilities at home reduce the amount of time available for education. The actual time spent learning subject content either in school or as part of homework has been identified as an important factor affecting learner performance (UNESCO 2007:72). Thapelo's uncle attributed the child's poor performance at school to only one factor, that is, grieving for the loss of his mother; however, it could also be due to increased responsibilities at home.

5.2.2.4 Emotional changes resulting from changed family circumstances

Thapelo experienced emotional changes in that his emotional needs were met when his mother was alive and they were living with his father, however, he experienced feelings of depression when he lost his mother and was rejected by his father. He expressed his feelings of frustration in this way:

> *My dad used to live with us but he went away. He used to be with my mom but he left. He used to buy us what we need, but now, he doesn't care about us because at times when I go to him I don't find him; sometimes he will tell me to go back home he does not have money.*

Sengendo & Nambi (1997:107) point out that children who are frustrated, fearful and depressed may fail to concentrate in class and therefore perform badly. In a study conducted on the impact of the HIV/AIDS epidemic on access to and quality of basic education for AIDS-affected children in Zambia, Robson & Kanyata (2007) point out that the teachers in their study commented that participation and quality of learning was characterised by, among other things, children who are psychologically and emotionally traumatised.

5.2.3 Experiences of learners in sibling-headed households

Since two of the learners, namely Maria and Grace, share similar experiences of being raised in sibling-headed households, the themes emerging from their narratives will be discussed after presenting the two narratives discussed below.

Maria's story

"I want to be a nurse, I want to help sick people, I want them to be well"

Maria is 13 years old and is in Grade 7. Previously, she lived with her mother and her three siblings in an informal settlement on the outskirts of Pretoria. Their home is a single room built of old corrugated iron divided with cardboard sheets into kitchen and bedroom. She says that her mother used to take good care of them: "*When I came back from school, she made sure that I wash my school socks and I am neat.*" Her mom helped her with her homework.

In 2003, her mother became sick and the children took care of her for a while:

> *When she wanted things we give it to her when she needed water we would give it to her, we took her to clinic and they would give her medicine and when we could not take care of her anymore my aunt came to fetch her (and) took her to Kangala.*[15]

The children remained in Gauteng Province and Maria's aunt took care of them although she did not live with them. They would phone the aunt when they needed food. Maria's mother died in 2003 and Maria believes that her mother's illness was caused by witchcraft.[16]

After the death of her mother, Maria moved out of her home to live with her granny in a different section of the township. When I interviewed Maria she had moved from her granny's house and was living with her sisters aged 23, 16 and 18 years of age. The 23-year-old sister was heading the household and had a two-year-old child. She had completed Grade 12, but was unemployed. Maria's family depends on social grants and food from the community organisation, Heartbeat.

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[15] This is a district in Mpumalanga province more than 100 kilometres away.

[16] As reflected in Chapter 3, throughout the African context the onset of illness is attributed to, among other things, witchcraft

Her sister and the people at Heartbeat help her with homework: "*If you have homework and you don't want to write it at home you go there and they help you.*"

When I asked Maria's class teacher to describe this learner she said:

> *Maria as a learner was good last year[when she was still staying with her grandmother] but this year she started deteriorating in class and when I started following this up to find out what's wrong I found that she has changed her residence. She used to live with her granny and all of a sudden she decided to go her parents' home. At her home it is just her sisters. I think she must have told herself that at her home she is going to have fun. Then she started to be a nuisance in class, she did not care about her school work then I got one of her sisters when I asked her why Maria's work has deteriorated and she said Maria used to live with her granny, her granny used to take care of her. Then Maria suddenly thought her granny is bothering her so she wanted to go back home. She came back home and now at home she does not listen to her sister. When she tells her to wash she doesn't want to and when she tells her to do homework she does not want to.*

When I interviewed Maria's sister she confirmed this: "*When I talk to them they don't listen to me, they don't take me serious and I tell myself they will be grow up one day and they will go through what I am going through with them now.*"

The teacher also mentioned that this learner used to be absent from school: "*In March, April she used to be absent from school. When she came to school, she was always dirty, you could see that she was tired and would not know what was happening.*"

When I asked Maria about her plans for high school, she said:

> *I wanted to go to Hofmeyer but they say at Hofmeyer we have to pay school fees ourselves. You know that here I don't pay school fee, Heartbeat pays for us but at Hofmeyer your family have to pay they say don't accept Heartbeat thing. In fact Heartbeat does not pay school fees but they get the school not to charge school fees so, at Hofmeyer they don't agree with this.*

When I asked about her future career she said: *"I want to be a nurse, I want to help sick people, I want them to be well."*

Grace's story

"I wish I had my mother and father, just like other kids who have their fathers and mothers."

Grace is 11 years old and is in Grade 5. This was her first year at her current school. Before her mother passed away, she lived with her mother, two sisters and a younger brother. Her mother was unemployed and they depended on social grants. She used the grant to buy them food while the school provided them with books and school uniform. Her mother used to help them with homework and when she was out looking for a job her sister would help them. Then her mother became ill and consulted a traditional healer, who told her to go and train as a "sangoma".[17] Maria enjoyed the time before her mother fell ill and had to leave them to go and train as a sangoma. *"It was nice she used to buy us clothes, cook for us, that was before she went to train as a sangoma. She lived with us until she got sick and was told to go and train as a sangoma."*

Grace's sister left school during the time that her mother was ill. Her mother did not complete her training as the illness took a turn for the worse and she ended up in hospital where she died in December 2005. Following the mother's death, the older sister aged 19 became the main caregiver. She is unemployed and takes care of the other siblings aged 8, 11, 13 and 15. The family depends on the community organisation, Heartbeat, for food each month, which lasts them two weeks because they are a family of five. The family does not receive any social grants, although their neighbour has their birth certificates and has promised to help them access the grant. At the time of the study, this had not been done. When I asked Grace's sister about support from relatives, she indicated that they do not receive any.

One day when I visited the school, Grace shared an incident with me that had taken place at her home the previous night. She told me how a man had broken into their house, come into their bedroom and attempted to rape her sister. However, when her younger sister screamed the man had run away. Even when narrating her lived experiences in writing, this was the only incident

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[17] According to African cultural beliefs, sangomas or diviners are called to their profession by their ancestors, and at first are apprenticed to a teacher and trained to contact the ancestral spirits as a source of inspiration. This enables them to diagnose misfortune and illness.

she wrote about. It appeared to me at the time of the study that this incident had traumatised the girls profoundly.

Grace's sister confirmed that someone had broken into their house because the door did not close properly. Social workers had promised that they would have the door fixed but they have been waiting a long time and nothing has happened. Their house is built of corrugated iron and sheets of cardboard and has a single door. Informal dwellings of this nature are normally very small – about 4 metres by 4 metres square. An old curtain is used to divide the kitchen and the bedroom, and the single bedroom is shared by the five of them. Grace's sister said this about the house: "*It feels like we're outside when it rains we get wet, this bedroom is not a bedroom.*"

In terms of her school work, Grace said that she struggles with reading; she had failed English but passed Afrikaans and other subjects. Her teacher commented on her performance in this manner:

> *She is a child who does not participate in class. She performs poorly in class, she lacks basic understanding of so many things. Like I teach them Maths and Physics. She can't read or write. When it comes to transcribing from the board, there are words that she will leave out.*

Another teacher made similar comments about Grace:

> *… when you look at a child like Grace you look into the future and then you ask yourself my God this child in five years to come where will she be if she can't read? It's like a cycle, if this child can't read in Grade 5, after 5 years she will be in high school and she can't read. She did not get the basics, phonics and consonants. If it was possible she should attend remedial classes. But now it's a problem because in Grade 5, it is not possible to start with Foundation Phase work and again if you say to these children go to remedial classes those people will charge, it becomes difficult . The only thing is to push her from one grade to another.[18] Even if she can get remedial help she needs support from home. Kids like these need to be adopted. It's a pity as black people we don't adopt kids.*

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[18] The National Policy on Assessment and Qualifications for Schools in the GET Band (Government Gazette No. 29626 of February 2007a) provides requirements for promotion in Grades R–8. The policy indicates that ideally all learners in Grades R–8 should progress with their age cohort and that no learners should stay in the same phase for longer than four years (or five years in the case of Foundation Phase where Grade R is offered) meaning that, a learner may repeat one grade per phase. However, clear requirements against which learners progress from grade to

When I asked Grace what she would wish for she said: "*I wish I had my mother and father, just like other kids who have their fathers and mothers.*"

5.2.3.1 Emerging themes

The emerging themes from the two learners raised in sibling-headed households will now be presented. Themes emerging from Maria's and Grace's stories include absenteeism; performance at school; belief in witchcraft and traditional healing practices**;** career choice and aspirations; support for learning; taking care of parent; poverty; safety and security in the learner's home**;** and a need for food.

5.2.3.1.1 Need for food

The two families rely on social grants and food parcels from Heartbeat. In Grace's family, the food provided by Heartbeat lasts them only two weeks. When I asked Grace's sister about what happens when the food runs out, she said: "*In the morning they leave without eating but in the afternoon when they come back from school I make sure that they get food I try my best to see to it that they get bread, because in the morning they left without eating.*" When children leave for school without having breakfast this may affect their ability to concentrate in class. Chinapah *et al*. (2000:34) maintain that the ability of learners to concentrate and derive the maximum value from their school experience is severely reduced if they do not have an adequate food intake. Furthermore, the regularity, number and adequacy of meals received by learners in a school day are of critical importance in raising efficiencies in the utilisation of school opportunities.

5.2.3.1.2 Impoverished household

The type of dwelling these learners lived in and the way they were crammed into single-roomed houses suggests that there was no room for learners to sit and do their school work. Furthermore, given that the learners do not have television sets or radios in their homes, they would have limited exposure to the language of learning and teaching. During the time I spent in the learners' homes, I noticed an absence of books, magazines and newspapers. In situations where people do

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grade have not been spelt out for Grades R–8. In practice, provinces have either determined their own progression requirements, mainly modelled on the Grade 9 promotion requirements, or left progression to the discretion of the teacher, principal or district official, in which case the school may decide to move the learner to higher grades without acquiring the necessary skills

not have the resources to acquire sufficient food, these families would be concerned with spending money on basic needs such as food rather than using their social grants to provide resources such as books, magazines or newspapers.

Furthermore, Maria recognised that as a result of her family's financial state she would not be able to attend the high school of her choice. High school fees in the area amount to about R250 per annum, which had to be paid at the beginning of the school year. Although this amount may seem affordable, the two families cannot afford this because they spend their social grants on basic needs.

5.2.3.1.3 Safety and security in the learner's home

Safety appears to be a challenge in female sibling-headed households. The incident that took place in Grace's home could affect her concentration in the classroom because she could be physically in the classroom but her mind may be completely occupied by the incident coupled with fears for her safety and the safety of her family. In similar studies on the lived experiences of orphans in child-headed households, Leatham (2005) and Masondo (2006) found that orphans in these households experience fears about their safety because there is no adult to protect them from harm. Similarly, Brookes, Shisana & Richer (2004) contend that poverty and living in informal settlements, as is the case with these learners, constitute a risk for children because of decreased protection and increased exposure to potential abuse.

In such environments learners come to school traumatised, yet schools in South Africa, particularly those serving African communities, do not have trained counsellors on the staff and are seldom able to access the services of trained psychologists. The staff and community rely mainly on community-based organisations for the provision of such services or they make use of traditional healers or church leaders to provide such help. Leatham (2005) notes that adolescent learners from child-headed families experience a need for emotional support, as they cannot put their emotional difficulties aside during school hours. As a result she recommends that educational psychologists and social workers be on site at schools in the community they serve.

Kakuru (2006:106) asserts that academic competence is not only a measure of cognitive skills but also includes subtle indicators of learners' ability to participate in classroom activities and exhibit the attitudes necessary for excellent performance. Among the factors that could hinder effective

learner participation in the classroom, I include the emotional effects of having lost a parent or being distracted by problems experienced at home (e.g. lack of food or safety at home) and the inability of the teacher to deal with such problems.

5.2.3.1.4 Absenteeism

Maria's sister indicated that she often asks Maria to look after her child when she has to collect the child support grant. This means that Maria has to miss school at least once a month. She expressed this in the following manner:

> *Sometimes they do miss school, I have a small child so when I have to go and get their grants I have to ask one of them to look after my child because they don't allow us to bring kids there. Most of the time I ask Maria to stay at home.*

The class teacher also confirmed that Maria is frequently absent from school.

> *In March, April she used to be absent from school, when she came to school she was always dirty, you could see that she was tired and would not know what was happening.*

This finding has implications for the parental or guardian responsibility for educating the child, as stipulated in section 3(1) of the South African Schools Act (SASA) Act 84 of 1996.[19] For example, section 6 (a & b) of SASA imposes a penalty on parents and guardians who fail to comply with section 3(1) of the Act. The policy assumes the presence of a parent or an adult figure who will ensure that the child attends school regularly.

Although Maria's sister had assumed guardianship of the siblings in her care, she failed to ensure that the siblings attend school regularly, because she also needs the social support from other adults. This implies that, in sibling-headed households, the main caregiver is denied the support that can be provided by members of the extended family or the community. Mosley-Howard & Evans (2000) point out that, in African American families, there is an expanded meaning of parenting; when households experience transition or life stressors close relatives often share rights and responsibilities with regard to children. However, with the increase in the number of orphans, it seems that the traditional practice of the extended family taking care of the children of relatives and the reliance on the extended family members for social support is diminishing,

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[19] South African School Act (SASA) (Act 8 of 1996) provides that: "Subject to this Act and any applicable provincial la, every parent must cause every learner for whom he or she is responsible for to attend school from the first school day of the year in which the child reaches the age of seven years until the last day of the year in which the learner reaches the age of fifteen years or in the ninth grade, whichever occurs first."

which puts learners raised in sibling-headed households at a disadvantage in terms of their schooling experiences.

5.2.3.1.5 Support for learning in sibling-headed households

It is evident from this study that learners from sibling-headed households do not receive support or supervision with school-related tasks. For example, Grace's sister said: *"Sometimes she will take out a book in the morning asking for help with homework."* When I asked Grace why she did not do her homework in the evening she said she plays in the evening. Her sister added: *"Even when she has to write exams she doesn't study. It is difficult I won't say it is not."*

In the same way, when I asked Maria's sister if she helped Maria with homework she said: **"***She does not tell me when she has homework and sometimes I don't check her books. These kids are not serious about their school work. So, I just leave them"*. Maria's teacher confirmed that Maria's performance had deteriorated since she moved from an adult-headed to a sibling-headed household.

It appears that, due to the absence of an adult, the older siblings find it difficult to encourage younger siblings to spend time in the evening on their homework. Thus sibling-headed home environments disadvantage the learner in that they do not provide opportunities for the learner to practise the newly acquired knowledge and skills provided by the school. Keith *et al*. (1986:378) maintain that encouragement to complete homework has a much stronger and positive indirect effect on learner achievement. Learners benefit in personal and academic development if their families emphasise or model the importance of schooling (Epstein 1985:19).

5.2.3.1.6 Belief in witchcraft and traditional healing practices

One of the emerging themes from these learners' data is their belief in witchcraft and traditional healing practices. Both Maria and Grace believe that their mothers' illness was caused by witchcraft. When Grace's mother was ill, she consulted traditional healers, suggesting a belief in the ancestral power to heal. *"She said to us, 'My kids I want to go and see a stronger inyanga [traditional healer] to tell me what is wrong with me'."* The traditional healer told her mother that her aunt had bewitched her [Grace].

As indicated in Chapter 3 of this study, the manner in which learners construct their realities is embedded within sociocultural contexts. Their lived experiences are grounded in the values, beliefs and traditions of their families and their community. Manala (2006) and Wreford (2005) argue that throughout the African continent the onset of illness is attributed to witchcraft among other things. Manala (2006) argues that the belief systems of African people, such as the belief in the role of ancestors and witchcraft in causing sickness and other misfortunes, are often viewed as irrational and meaningless in terms of a Western worldview. Manala (2006) contends that this rejection does not resonate with the African worldview in which problems with health and illness are understood from an African religious perspective. Similarly, Fayden (2005), referred to in chapter 3, argues that the knowledge base and the culture that children bring to school are often disregarded and discounted as irrelevant and unfavourable.

The fact that learners make meaning of their lived experiences from their sociocultural context has implications for the learner outcomes as set out in the Revised National Curriculum Statement for Grades R–9 (2002a), as well as the roles of educators as stipulated in the Norms and Standards for Educators (DoE 2000). The Revised National Curriculum Statement for Grades R–9 (2002) envisages, among other things, learners who are able to *collect, analyse, organise and critically evaluate information.* In the same way, the Norms and Standards for Educators states that one of the roles of an educator is that of mediator of learning. If educators are perceived as mediators of learning and learners are expected to be able to analyse and critically evaluate information, then educators should create a space where learners are encouraged to analyse and critically evaluate information on the perceived relationship between illness and witchcraft. The teacher should do this while showing appreciation and respect for learners' knowledge and value systems.

5.2.3.1.7 Taking care of the parent

As indicated in the first chapter, orphanhood in this study is defined as a process which begins when the main caregiver, usually the mother, is too ill to carry on with her parenting responsibility. Maria and her other siblings took care of their mother when she was ill: *"We all took care of her, when she wanted things we give it to her when she needed water we would give it to her, we took her to clinic and they would give her medicine."* In Grace's family her sister had to leave school to take care of their mother. Taking care of a sick parent implies increased responsibilities at home which reduce the amount of time available for education. Added to this,

the children may be attending school but not learning because they are unable to concentrate in class owing to anxiety related to their parent's illness (Boler & Caroll 2003:6).

5.3 COMMON THEMES EMERGING FROM ORPHANED LEARNERS' INTERVIEWS AND IMPLICATIONS FOR SCHOOLING

In this section I present and illustrate findings of data collected from the four learners including those from the other learners interviewed in this study, as well as data from some of the learners' teachers and guardians and my own observations.

5.3.1 Career choice and aspirations of orphaned learners

The lived experiences of learners in this study inform their aspirations. Given that food and clothing are their most immediate needs; their wish is for such basic needs: "*I wish at home we had money for clothes and food*" [**Thapelo**].

One reason that learners in this study gave for their career choice was the intention to help other people, particularly orphans:"*I want to be a doctor, I want to help people, when they are sick and have TB*" [**Kamogelo, a 9-year-old Grade 4 learner**]; "*I want to be a social worker, I want to help children who do not have parents and help people with their problems*" [**Refiloe, 12-year-old Grade 7 learner**]. In a similar study, Ogina (2008) found that orphans aspire to helping fellow orphans**.** This observation confirms the point I mentioned in Chapter 3 of this study, that black children have been socialised to be relational and interdependent and that the individual gains significance from and through his or her relatedness with others (Ellis in Nsamenang 2003:216). Hence, in the African community we have this proverb: *Motho ke motho ka batho ba bangwe* which translates as: "An individual is a person because of other people."

It appears that, owing to poverty in these children's homes, they realise that they would be dependent on financial support to further their studies. This also shows that these learners value education in terms of providing them with opportunities to better their lives. The following response serves as an indication of this: "*I want to finish school and help my brother* and "*to get a bursary to go on with my studies*" [**Nkosinathi, 14-year-old Grade 6 learner**]. Furthermore, the fact that this learner reported the intention to help his brother in his future aspirations indicates a sense of collectivism within the African community. Additionally, the motivation to carry on

with their studies suggests that they value education and are therefore less likely to voluntarily drop out of school. Poverty and a lack of support may, however, force them out of school at an early age.

Another learner wished to be reunited with her younger sister: *"To live with my younger sister and granny. I want my sister to come back home"* [**Nomsa is an 11-year-old Grade 4 learner. Following the death of her mother, she was separated from her younger sister because her granny could not afford to take care of both children**]. Zivor (2007), in her study of the self-esteem of AIDS orphans, asserts that the separation of siblings places added emotional and psychological stress on children.

It appears that Foustina longs for the type of family where there are parents and a lifestyle which is different from the current one: *"I wish when I am a grownup we could as a family with my kids go on holiday to America, live in a big house, we should not live in an area where there are no thugs, I wish my parents will come back to life."*

It seems also that the learners' career choices and aspirations are motivated by the emotional pain they experienced when their parents were ill and unable to carry out their parental responsibilities. The following utterance serves as an indication of this: *"I want to be a nurse, I want to help sick people, I want them to be well."* Perhaps Maria felt that, had she been a nurse, she could have helped to make her mother better. Grace's wish seems to be motivated by her current situation where she is being raised in family without parents: *"I wish I had my mother and father, just like other kids who have their fathers and mothers."*

5.3.2 Fear of losing the main caregiver

It was evident in this study that, following the death of parents, particularly the mother, affectionate connections are transferred to grandmothers and other family members. As a result these learners fear losing their current main caregivers. Foustina conveyed concern about losing her main caregiver in this manner: *"… now we stay with our grandmother and my grandmother work hard to support us and I don't want to lose her".*

Another child expressed her emotions in this manner: *"When my grandfather beats my granny my heart feels sore I say to myself one day he is going to kill her and what's going to happen to me"* [Lerato].

One Grade 4 learner, who lives with her grandmother, seemed nervous when I interviewed her. When I reflected on the nervousness she said that she was worried that her grandmother would be admitted to hospital again because of her swollen legs. The previous time her grandmother had been admitted to hospital she had had to stay with her class teacher. Apart from worrying about her grandmother, she wanted to find her father. In her narrative the only thing she wrote about was that her mother had died when she was small and *"Please find my father, his name is Colen Leeu."* During the interview, she asked me to try and find her father. In a similar study, Ogina (2008) found that learners expressed feelings of longing for their absent fathers and wanted to know where their fathers were.

5.3.3 Morals and values

It appears that learners' experiences are grounded in the morals and values that govern their lives. Their deceased parents transmitted positive values and morals as echoed by some of the learners:

> *He would say I must go to school, I mustn't smoke, must not take alcohol, I must not be naughty. I used to be very naughty, I used to steal but after my father died on 10 December my mother told me told me to stop being naughty and since then I stopped up to today* [Nkosinathi].

It seems that the fathers played a role in enforcing acceptable standards of behaviour.

When I asked the same child about what had made him stop stealing he said: "*I realised that being naughty is not right because I won't complete schooling, my relatives have all completed schooling, and they have their own houses*" [Nkosinathi].

It would appear that Nkosinathi was motivated to change his behaviour when he realised the importance of schooling and the anticipated brighter future with education.

Other learners said:

> *She said we must attend school and not waste money. We won't forget what she told us* [Refiloe].

> *They said I must not go out at night, when I get to high school I shouldn't be like other children who will go out with boys. I should take care of my brother and my brother should also take care of me. My father said to us when we die don't think you'll be alone there are people out there and they will take care of us and God will be with us"* Her mother told her not to worry after her father's death because " *God took him, in life one day we will follow him"*.

When Foustina received news about her mother's death she reacted in this manner: "*My father take my mother to God*" [Foustina].

It appears that the deceased parents valued education in that they encouraged their children to attend school. Furthermore, they stressed the importance of caring for family members, suggesting that they were being socialised to be interdependent. Added to this, it appears that belief in God is important in helping children understand that when people die they go to be with the Lord. For example, in the African community, children are told by elders that their parents have gone to be with the Lord. It could be comforting for the child to know that her father and mother are together with the Supreme God.

This study has also shown that although learners experience the need for care and support they are socially conscious of the needs of others. For instance, when I asked Foustina whether she participated in the feeding scheme, she responded by commenting about the children that are on this programme

> *No, these children come to school without having eaten because there is no bread. We don't laugh at them because we know that one day we won't have lunch, we feel sorry for them. When my shoes are torn my granny will get them fixed and I bring them to school to give to other children.*

It is important to note that, although the new curriculum, the Revised National Curriculum Statement, focuses on values such as respect for democracy, equality, human dignity, life and social justice (DoE 2002a), values such as interdependence, self-discipline, respect for adults and

the importance of education play a significant role in the lives of these learners. Edwards (2003:255) argues that during interactions between children and adults, adults use specific experiences that serve to show what is valued and seen as useful by family members. Adults socialise children into the expected values and norms of their community (Lim & Renshaw 2001:14).

Added to this, in traditional African families, child-rearing rested on religious beliefs, discipline, respect for parental authority and reliance on experience (Martin & Martin 1978:49). Reliance on experience is often expressed by the elderly in maxims passed from generation to generation such as "learn to do without", "be thankful for you have", "blood is thicker than water". These were repeated by the elderly in their day-to-day activities of bringing up children in the extended family. Strength, perseverance, hope and faith are what elderly Africans sought to instil in their extended families. Children are expected to respect the elderly or older people, and they believed in quick and decisive discipline so that the child would know what is considered right or wrong conduct (Martin & Martin 1978:50; Reagan 2005:71). The responsibility for teaching the child the moral and spiritual values of the community, as well as for ensuring compliance with those values, rested with the immediate family and ultimately the entire community (Reagan 2005:71).

5.3.4 Relationship of orphans with other orphaned learners

This study revealed that orphans form social groups. They form what one teacher described as a "*group of orphaned friends*". This group was formed as a result of the regular meetings that these learners have at Heartbeat support sessions. From my own observations I have noted the same learners that are in my study being together during breaks and after school. In a similar study, Ogina (2008) also notes that the learners in her study socialise with other orphaned learners. It seems that orphans associate with fellow orphans because of their similar experiences. As a social group, they develop an identity which influences their behaviour. In the extract below a teacher describes how this social group influences learner actions and behaviour. The teacher also mentioned that the academic performance of one of the learners had dropped as a result of conforming to group behaviour.

> *It's because of friends. Let me tell you something, last year I noticed something about Maria and her friends as orphans they become friends. They are a group of friends 'orphaned friends'. Yes, there's Heartbeat, so they would go to Heartbeat after school*

and they meet each other there and become friends there. One of her friends even wrote a letter saying that her granny does not treat her well she refuses to give her money. And I started to realize that they are friends, she and Maria are friends with the others. Last year Maria lived with her granny and at the time when her friend was complaining about her granny, Maria decided to leave her granny's house and went to her home. They want to be by themselves without an adult and when there is no adult there's problems.

Akerlof & Kranton (2002) point out that learner effort is influenced by the social group to which the learner belongs and by the ideals of that group. Such behaviour can either promote or reduce learning effort in that learners strive to conform to the behaviour pattern associated with their group.

5.3.5 Behaviour of orphans

Although in the previous discussion the teacher reported negative behaviour from orphaned learners, generally teachers noted positive coping behaviour. Teachers observed no difference in the behaviour of orphans as compared to non-orphans in terms of academic performance and general behaviour in the classroom. Different teachers mentioned the following about the learners in the study:

They are like any other kids at school. They listen to the teacher in class, even when they have difficulties there and there but they are generally fine. When they do not understand something in class they ask and Nkosinathi talks, he is open, he doesn't hide anything. He would tell me that after school we went to that place to collect food parcels. Bongani is quiet. He doesn't talk much, he is not like Nkosinathi. Bongani will just do his work when you tell him to do something he will do it. When it comes to school work they don't have any problem **[Bongani and Nkosinathi's teacher. The two are brothers].**

She behaves like a normal child especially emotionally. If you did not know that she is an orphan you could not just detect anything. She does her homework and I understand her sisters help her with study at home like you know with kids, child to a child they might decide on their own not to study. But the initiative is there and again they are part of Heartbeat. It helps them because they have a support group every Monday where child feels I am not alone it helps they help them with things they want to buy and again Grace is one child who does not come to school in tattered clothes. She is neat although you can

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see that her clothes if I could afford I could help but she is well taken care of by her sister **[Grace's teacher].**

Sometimes there is that disturbance but she can cope because she is outspoken and her work did not deteriorate. She is just fine and she has initiative. What I have noticed about her is whenever we talk of AIDS she is very much interested and in class we had to do two poems she is the one who said let's do a poem on AIDS and not the other one. Each and every thing when it comes to … she will be so attentive and contributing and you can see that she understands what she is talking about. Other than that she does not have a problem. It's such a joy to teach her I wish all kids would be like her **[Foustina's teacher].**

Sometimes she is shy but she copes but sometimes when you ask her questions she feels a bit insecure. When you look at her it seems there's something bothering her. Sometimes she falls asleep in class. When the teacher asked about her falling asleep in class she said there was nothing wrong. *But I think her home situation affects her because recently she confided in me telling me that her granny was fighting with her grandfather. She cried and I said things will be fine. When things like these happen at home it touches her but if things are fine she is okay. Regarding her performance in class, she copes well and her granny helps her with homework. Her granny does come to school, she does not stay long without coming to school. Even when I call her she comes to check her school work. She is a lot concerned about her school work. The other day she called me to tell me that Nomsa has been sexually abused by her stepfather. She even came to school to tell me about it* **[Nomsa's teacher].**

In similar studies, Leatham (2005) and Ogina (2008) report that there is no distinctive difference between orphans and non-orphans in terms of behaviour related to school work. It appears that the emotional and academic support that these children receive from their peers, the extended family and support structures like Heartbeat helps them to cope well in school.

5.3.6 The role of the extended family and other structures in supporting learning

My study revealed that although learners do not have parents to help them with homework, to motivate and instil positive attitudes, they have the extended family, neighbours, friends and community organisations like Heartbeat who support their learning in various ways.

In the extended family system, the responsibility for raising and supporting children does not fall exclusively on the biological parents. Members of the extended family are expected to take an active responsibility for the wellbeing of their relative's children (Mkhize 2004). Furthermore, Thompson, Alexander & Entisle (1988) point out that, in extended families, school-related responsibilities like monitoring homework might be shared among family members.

My study showed that school-related responsibilities such as helping children with homework are shared with other members of the household, for example older sisters, aunts and uncles and neighbours. It was also found that relatives who do not live in the same household as the learner assist the learners with homework and take an interest in their academic performance. This is illustrated in the excerpts below:

Researcher: *Who helps you with homework?*
Learner: *All of them.*
Researcher   *Who?*
Learner: *My aunt, uncle and granny. On Fridays my aunt helps me. My aunt helps me with homework, she stays in Matshiga sometimes my next door neighbour helps me with homework* [**The aunt does not live in the same household as the learner**].

She manages on her own she even helps her aunt. So where she can't manage the uncle is there but it's a problem when her uncle is gone to work. Her uncle doesn't stay with us he only comes during weekends, he will help her write home work [**Kamogelo's granny**].

We have a neighbour who speaks Zulu and I ask her to help her with Zulu. Other subjects she manages on her own, she only battled with Zulu. But she copes very well she told me that she passed Maths [**Foustina's granny**].

… the stepmother is determined to ensure that they do their school work. The last time she told Nkosinathi to ask me to give them two books and promised to replace them on Saturday when she goes to town. She really takes good care of them [**Nkosinathi's teacher**].

Furthermore, Nkosinathi said the following about his stepmother:

> *She tells us to attend school there are books, English books. Every day, she makes us read those books. When she is busy she tells us to take books and read for two hours when we get back from school we study, go play and she wants us home by 6 pm we wash, eat, do the dishes and we study. We only watch TV on Fridays.*

Keith *et al*. (1986:374) assert that parents who take a more active role in the child's educational and social lives are more likely to encourage their children to study harder and spend less time watching television.

Again the teacher mentioned: *"The last time Nkosinathi's uncle came to check his report and I explained to him how each of them perform at school."* The uncle does not share the same residence, yet he takes interest in the academic performance of his brother's children. According to African culture, the uncle is obligated to provide care and support for his brother's children. Furthermore, the child may experience the behaviour modelled by the uncle and the stepmother as suggestive of the importance of school. In turn, the child may have a more affective experience of the uncle and stepmother as providing needed resources to him.

My study also revealed that although the main caregiver (Kamogelo and Foustina's grannies) may be unable to assist their grandchildren with school work, the value they place on education, the motivation and the instilling of positive attitudes in the children, as well as the warmth and nurturing support, may contribute to positive learner outcomes. For example, although Foustina's granny was unable to assist her grandchild with homework; she nonetheless encouraged the child to concentrate on her studies.

Thapelo's uncle demonstrated support for the learner in his care by seeking professional help when Thapelo was involved in drugs. Furthermore, he constantly interacted with the school to monitor Thapelo's performance.

> *I have friends, counsellors I made sure that I meet with counsellors at Life Line. I took Thapelo there for counselling, they counselled him. He was better. Last year he failed Grade 4 and he is repeating the grade. I keep going to school to ask about his performance in class. I was told that he has improved it's not like last year after his mom died.*

Another observation made with regard to orphaned children raised in the extended family and sibling-headed households is that the family creates a sense of unity and belonging, care and commitment. The 27-year-old uncle who is taking care of four of his deceased sister's children, articulates his love, care and steadfast commitment towards these children.

> *Sometimes you feel like … you know I have my own needs, a lot of needs and they also have their needs the four of them but I won't leave them I won't give them to anyone I won't allow that to happen, I will do whatever I need to do to take care of them things will be better one day* [**Thapelo's uncle**].

In one of the sibling-headed household, when I asked the older sister aged 23 how she experienced taking care of three siblings and her own child as well, she said*:*

> *No, these are my sisters, if I don't take care of them who else will. I don't want them to be taken away from their home because they won't leave the type of life they have at home* [**Maria's sister**].

Strong utterances made by Thapelo's uncle and Maria's sister support Brown, Cohen & Wheeler's (2002) argument that the African family provides a network of persons who share resources, residents, emotional bonds and obligations, and support each other in environments characterised by social and economic adversity.

This finding also confirms Martin & Martin's (1978) contention that the extended family gives its members the emotional security of belonging, knowing they have someone who cares for them, someone they can turn to in times of crisis. Families are the first line of protection for children and they continue to form the core safety net for orphans, as they have done successfully for many generations in sub-Saharan Africa (Heymann & Kidman 2008:8). Given that Thapelo's uncle puts the needs of others first before his own suggests a sense of communalism and interdependence that is inherent in African people. According to African philosophy, the individual has a social commitment to share with others and care for others (Venter ,2004).

5.3.7 The role of the community in supporting learning

This study has revealed that, apart from the extended family, the community plays a significant role in supporting children's learning. In a follow-up interview, Thapelo mentioned that two matriculants who, as a result of poverty, are unable to further their studies have taken it upon themselves to help children in the neighbourhood with school work. The matriculants spend two hours each afternoon (from 3–5 pm) after school helping these learners to read and to complete their homework. The learner explained what happens in these sessions:

> *We bring scribblers and if you have homework you bring homework books and they help you. They start with homework and the remaining time they teach us Maths and reading. They give us sums to do, they give us words and ask us to use the words to make sentences, they mark our work and we start reading, and after reading we go home.*

My study has demonstrated that the family network and the community provide an important resource for supporting children's learning. Since most African families share a residence with extended family members, this has special relevance for the school performance of African children, as performance is enhanced by the support of other adults in the household (Thompson, Alexander & Entisle 1988). Similarly, an ethnographic study carried out by Perry (2005) on Sudanese refugee youth and families revealed that Sudanese children who have no parents or whose parents have limited English literacy skills and/or limited experience with education drew on broad support networks of extended family and community mentors for help. The relatives and community members provided important resources and support for these children's literacy achievement. Perry (2005) contends that, by recognising and valuing these extended networks and by learning how to tap into them, teachers would be better able to support scholastic achievement. A summary of the themes and subthemes emerging from the preceding discussion is presented in Figures D, E and F.

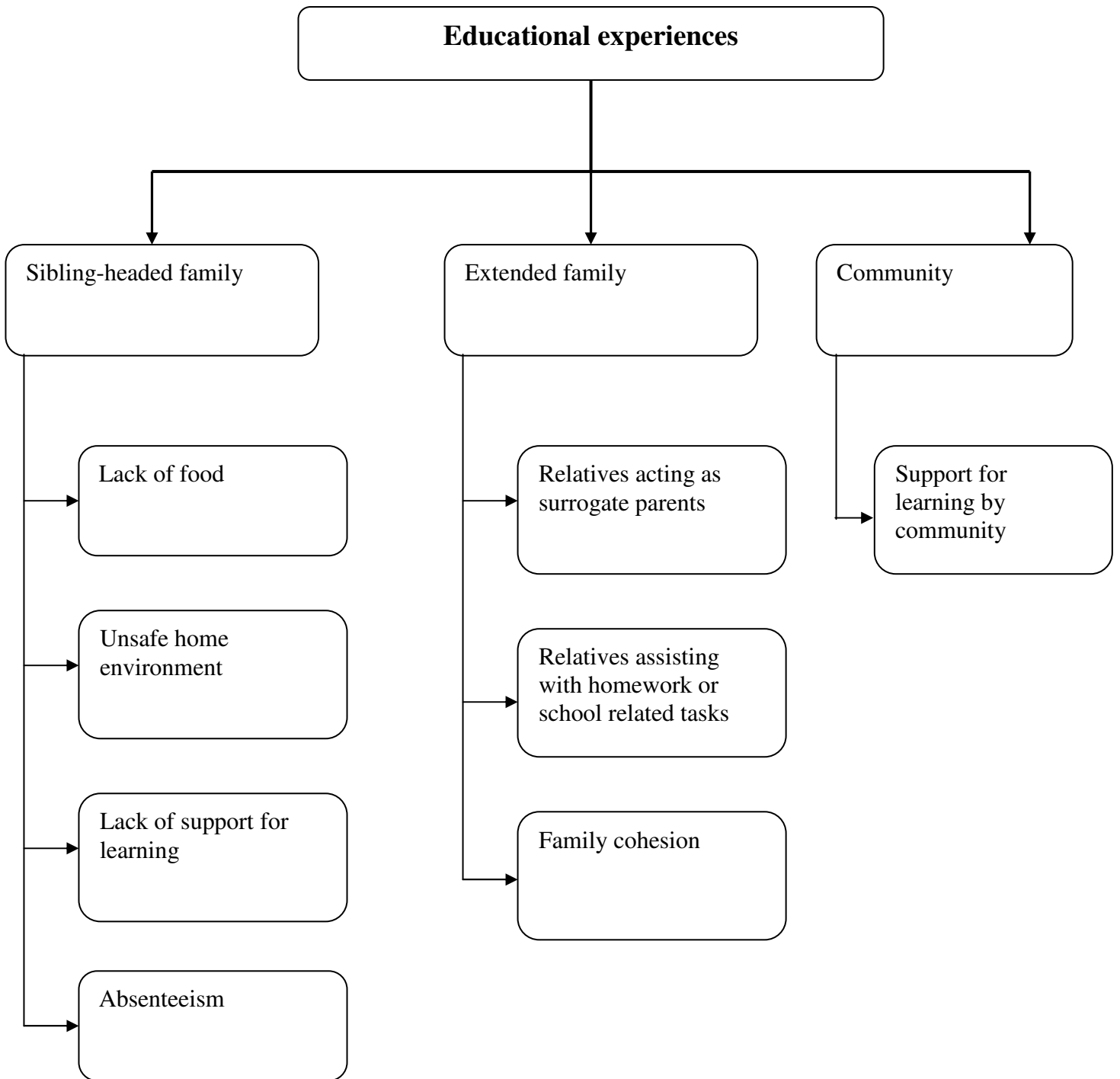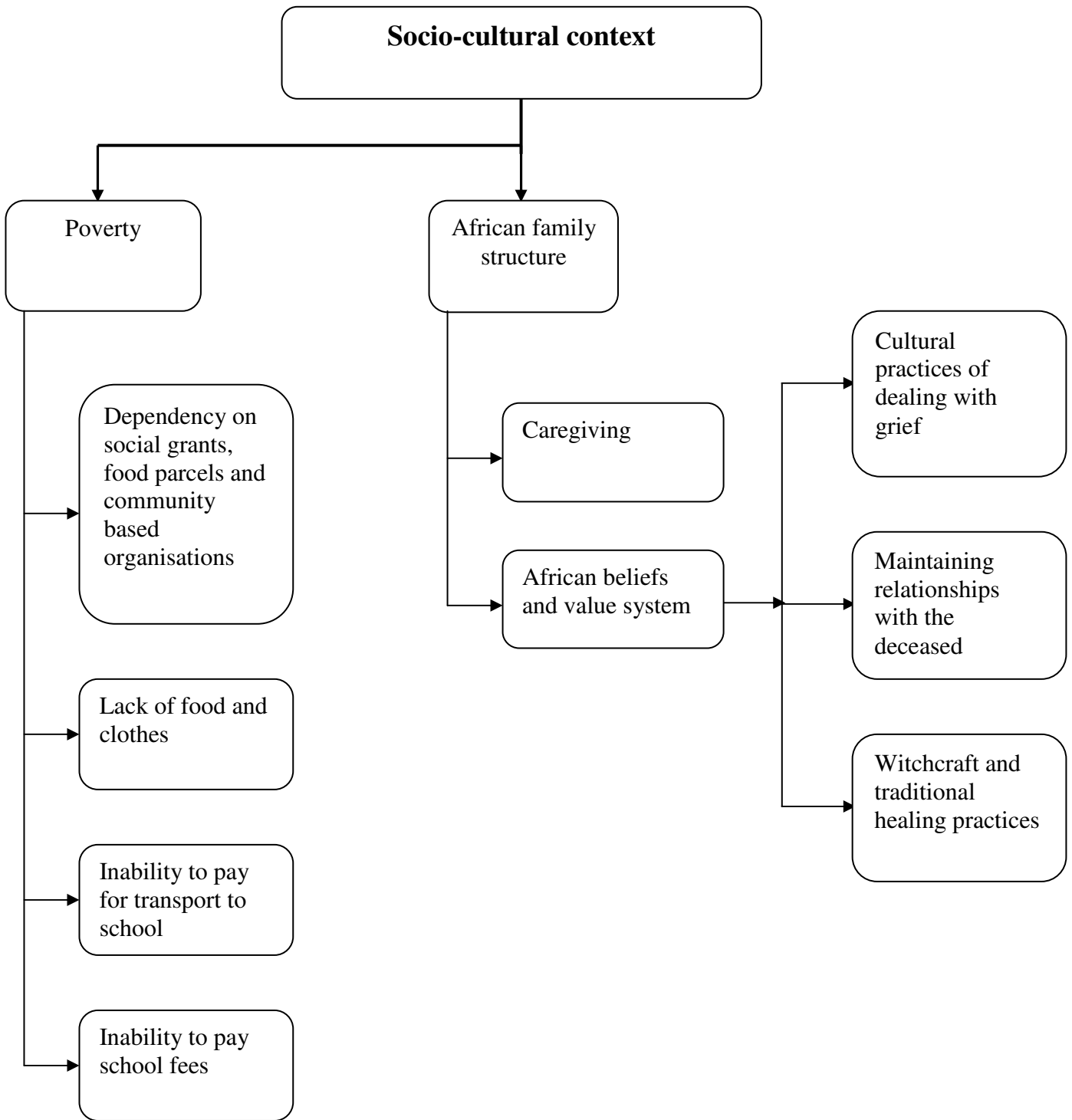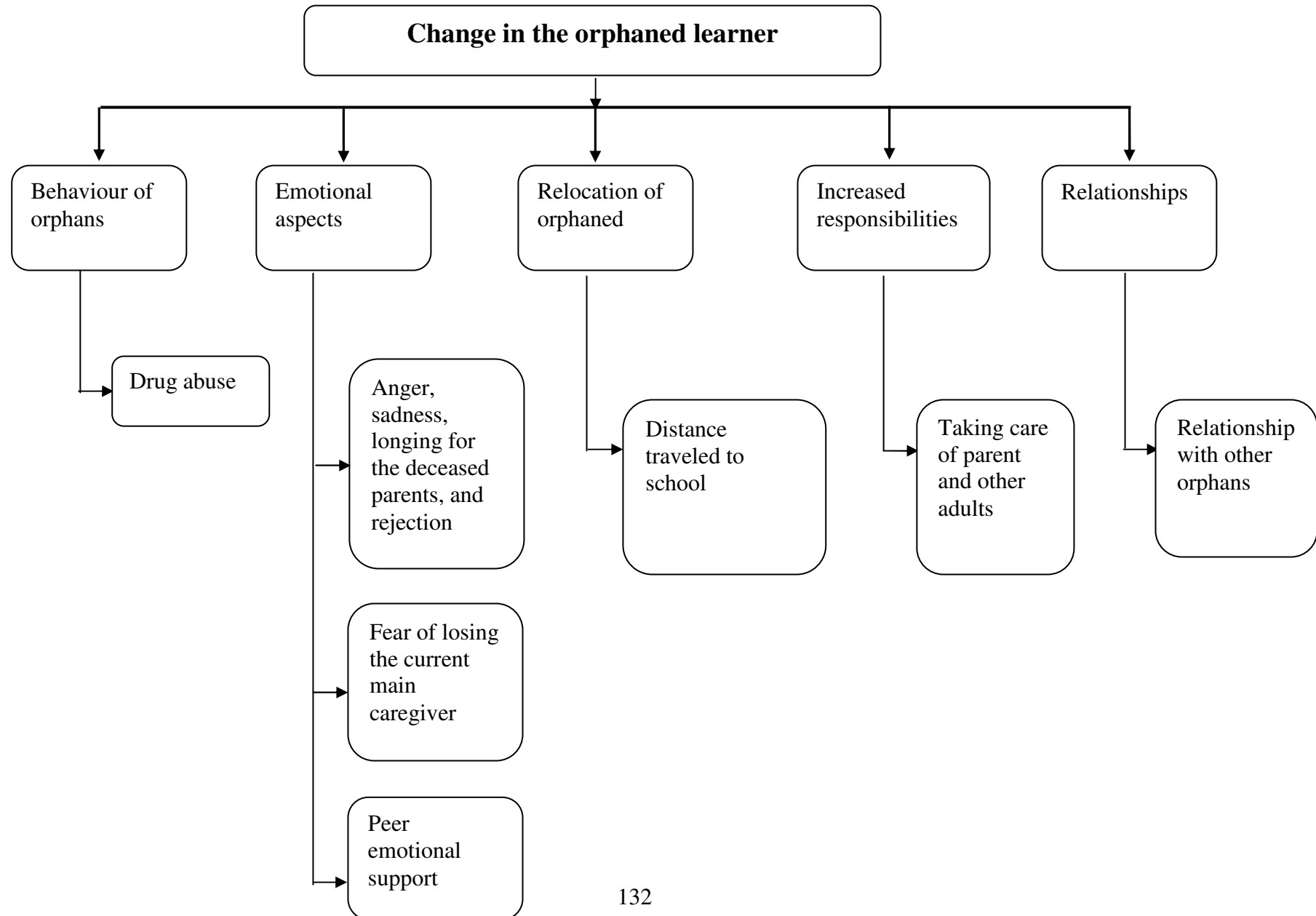*Figure D: Educational experiences*

Figure E: Sociocultural context

Figure F: Change in the orphaned learner

5.4 SUMMARY OF FINDINGS AND IMPLICATIONS FOR SCHOOLING

It was evident that the orphaned learners in my study lived in poverty and were disadvantaged in terms of proper shelter, food, emotional support and care and that these influences could impact negatively on the quality of education received. The learners were being raised in households where there is complete dependence on social grants and food parcels from a community organisation. The meagre income that these families receive from social grants suggests that there is little or no disposable income for school-related expenses. These experiences influence the quality of education provided by the education system.

Furthermore, the results revealed that orphaned learners experience emotional changes – from being joyful and fulfilled when their parent(s) were still alive to being sad and depressed following their parents' death. During interviews, they referred to the emotional and material input from parents and their resulting feelings towards them. When mothers were talked about it was more in terms of their warmth, care and creation of a warm and pleasant environment, as well as the value placed on education. The loss of their parents created emotional trauma and little help or support was forthcoming from the support structures at their disposal. The lack of availability of proper counselling services can thus delay the healing process and extend the negative impact of this on school performance.

Support for learning appears to be a challenge in sibling-headed households. It appears that these learners perform poorly at school because of the absence of a responsible adult who would ensure that children attend school regularly, enforce discipline, ensure that these children do their school work and provide proper care and support. The South African Schools Act (SASA) of 1996 stipulates compulsory school attendance, which places a legal obligation on parents of children covered by the compulsory education period to ensure that children between the ages of 7 and 15 attend school for that period. However, in these households the older sibling, albeit that they are no longer minors, may not have the parenting skills to meet the expectations of the education system in terms of parental supports and may not ensure that this law is adhered to. Chinapah *et.al.* (2000) point out that the physical presence of both parents in the home is of importance in ensuring learning support. They argue that given that a high proportion of learners in, for example, Botswana, live with a single parent, a sibling-headed household or within an extended family, such context-specific disparities need to be considered when conceptualisations of

education quality are made. There is evidence that the quality of education requires strong support from the learner's home. Schools alone would not be able to guarantee acceptable levels of educational quality (ibid.2000).

As pointed out in Chapter 3, traditionally, sibling care-taking occurred under the overall supervision of other adults (parent, aunts, and uncles) in the home and it was a way of preparing African children for the adult world. However, sibling care-giving as described in this chapter is characterised by an impoverished environment in which children are deprived of food and other resources, protection against harm, and a coherent moral and cultural teaching. Such a home environment has a negative impact on the intended quality described in the policies presented in Chapter 2.

My study has demonstrated that the extended family remains a source of support for orphaned children. Learners taken care of by grannies, uncles and aunts benefit from living in stable, nurturing and familiar environments in that they derive feelings of security and comfort from such settings. Furthermore, the children benefit from having different adults assisting them with school work or taking an interest in school-related matters. Keith *et al*. 1986 argue that parental *or adult involvement in the child's schooling* [my emphasis] such as actual or perceived expectations for school performance; verbal encouragement or interactions with the school, have positive effects on academic performance. With the increase in the number of orphans**,** it appears that the role of the African family system in providing support, nurturance, and care for family and community members remains essential (Weisner in Weisner, Bradley & Kilbride 1997:21).

Beliefs in witchcraft and traditional remedies, and the powers of the ancestors and the Christian faith are evident in the orphaned learners' narratives discussed in this chapter. Influenced by their cultural beliefs, these learners present contextual meanings attached to illness, misfortune and cultural ways of dealing with grief that differ from those of Western cultures. As discussed in chapter 2, a quality education is that which acknowledges what the learner brings into the teaching and learning environment. This implies that classrooms cannot ignore the knowledge, cultural beliefs and practices that orphaned learners bring to the classroom. Teaching should help learners build on prior knowledge in order to develop attitudes, beliefs and cognitive skills; as well as to expand their knowledge base (UNICEF 2000).

Learning occurs in formal and nonformal environments, but the positive learning outcomes sought by educational systems happen in quality learning environments (UNICEF 2000). Based on the findings of this study, a quality learning environment is one in which learners live in safety in their homes, are supported in learning by their family members, receive love and care from family members, learn morals and values from family members and the community, and have schools that provide counselling and tutoring to learners in need of assistance with social or learning problems. As told in Grace's narration, she struggled with literacy skills, however, but the school could not address this barrier to learning but resorted to promoting her from one grade to another without her mastering the basic skills. The lack of resources in schools to cater for poor learners experiencing learning problems impacts negatively on student learning and subsequently on learning outcomes.

The school needs to respond to the diverse and changing needs, interests and concerns of learners and communities, as well as the culture and learning styles acquired from the home of the learner (Darling-Hammond 1998:644). This point is recognised in the community and pastoral role of teachers stipulated in the Norms and Standards for Educators which entail, among other things, showing an appreciation of and respect for people with different values, beliefs, practices and cultures (cf. 2.2.3 g).

As indicated in Chapter 2, much discussion on educational quality centres on system inputs, such as infrastructure, and reducing pupil–teacher ratios, and on curricular content. However, recently more attention has been paid to educational processes. Addressing educational processes is critical in terms of the experiences of the learners described in this chapter. Such a focus would pave the way for teachers and the school as a whole to respond to the changing needs of learners in order to build meaningful learning experiences for all learners.

In Chapter 6, I discuss the themes that emerged from this chapter in relation to conceptualisations of quality education from policy documents.
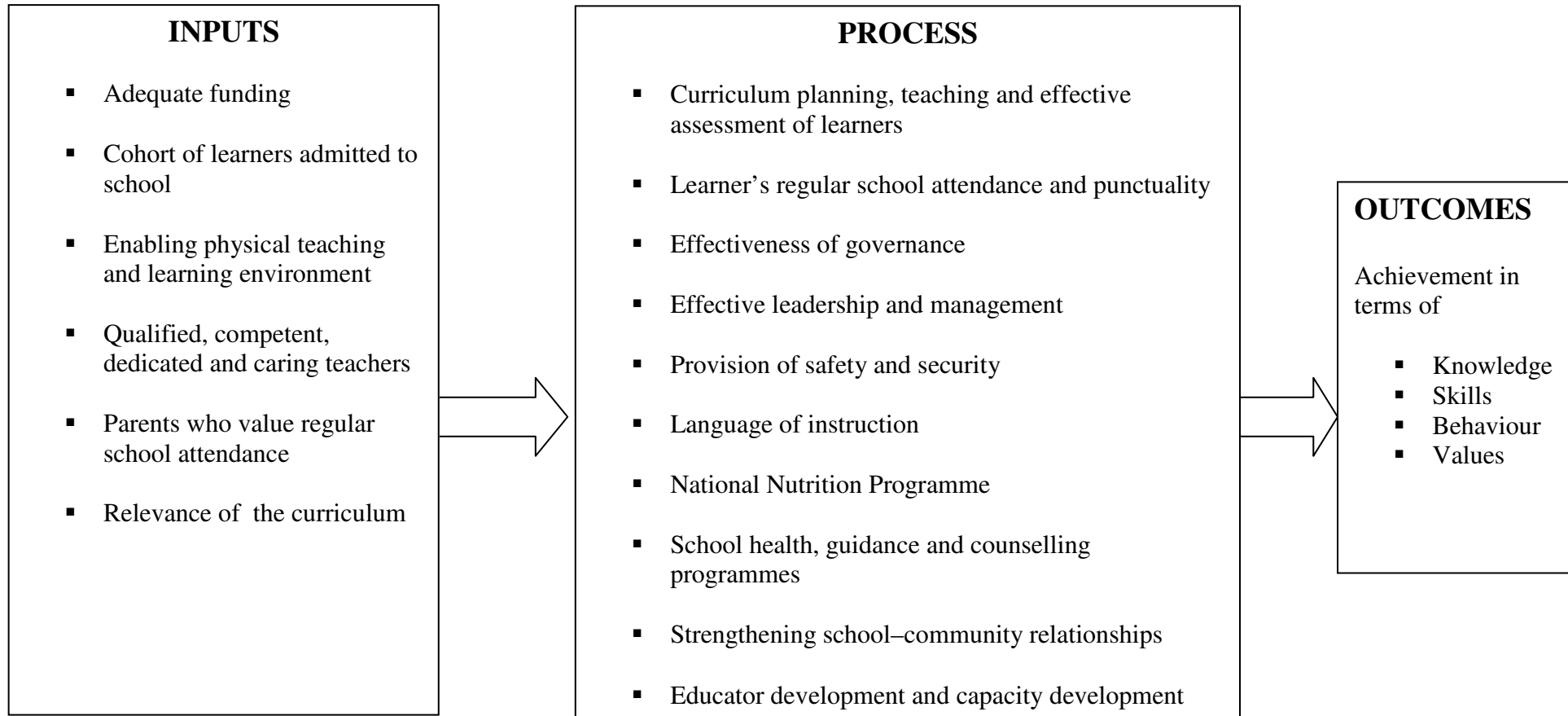
CHAPTER 6

EDUCATION QUALITY AND THE LIVED EXPERIENCES OF ORPHANED LEARNERS, FURTHER RESEARCH AND CONCLUSION
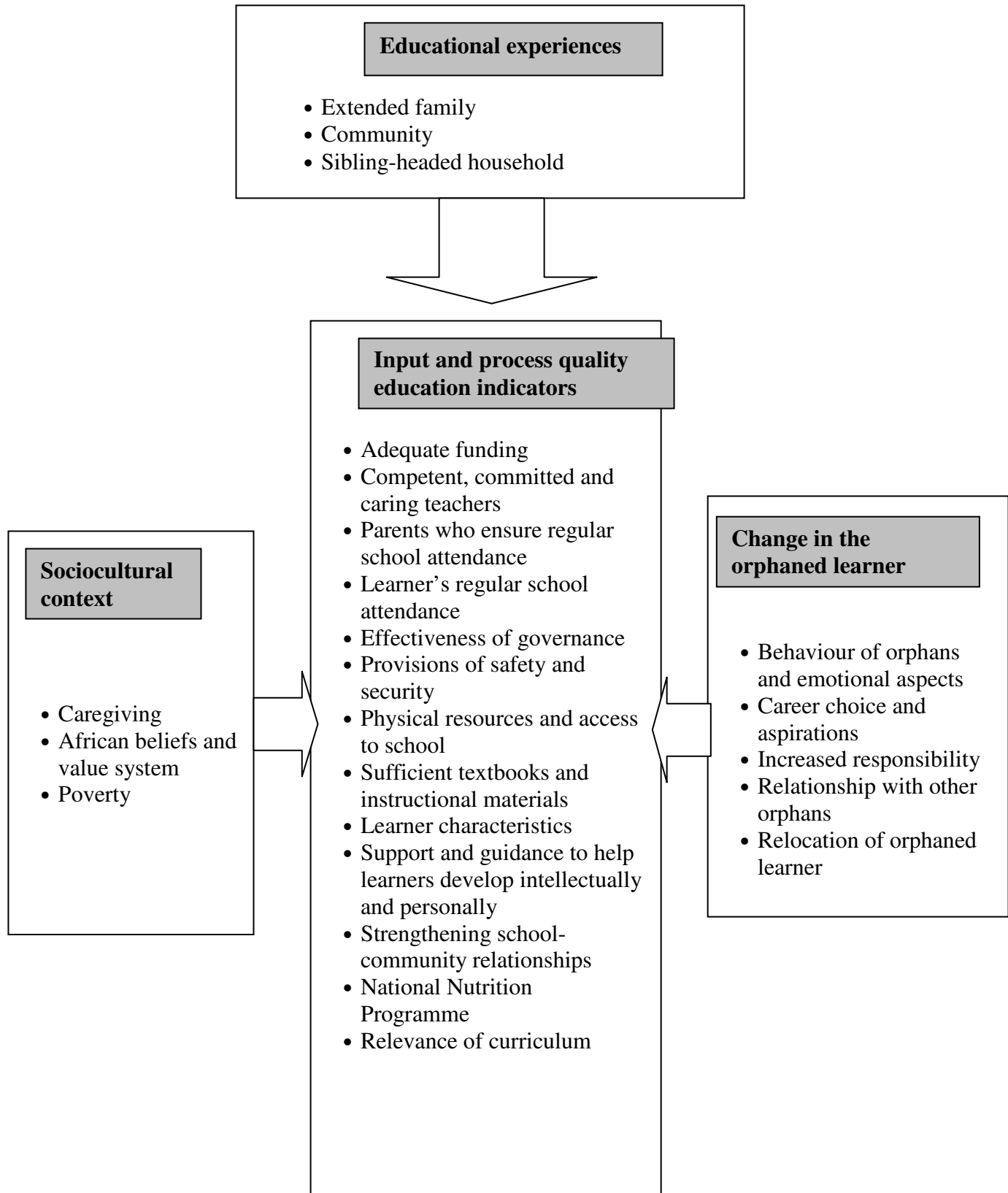
6.1 INTRODUCTION

The purpose of this chapter is to discuss the themes and subthemes that emerged from the narratives of orphaned learners in relation to the ideals set for quality education in the policies and legislative frameworks presented in Chapter 2, namely, the White Paper on Education and Training (1995), the South African Schools Act 84 of 1996, the National Norms and Standards for School Funding policy (1998), the Amended National Norms and Standards for School Funding (2006), the Revised National Curriculum Statement Grades R–9 (2002), the Whole School Evaluation (2002), Education White Paper 6: Building an Inclusive Education and Training System (2001), the National Norms and Standards for Educators (2000) and the National Policy for an Equitable Provision of an Enabling School Physical Teaching and Learning Environment (2008).

Figure G presents quality education indicators derived from some of the policy documents listed above. Figure H presents a synthesis of the themes that emerged from the lived experiences of orphaned learners, namely, educational experiences, sociocultural context and change in the orphaned learner. These themes are discussed in relation to the intended education quality discussed in the aforementioned documents.

INPUTS

- Adequate funding

- Cohort of learners admitted to school

- Enabling physical teaching and learning environment

- Qualified, competent, dedicated and caring teachers

- Parents who value regular school attendance

- Relevance of the curriculum

PROCESS

- Curriculum planning, teaching and effective assessment of learners

- Learner's regular school attendance and punctuality

- Effectiveness of governance

- Effective leadership and management

- Provision of safety and security

- Language of instruction

- National Nutrition Programme

- School health, guidance and counselling programmes

- Strengthening school–community relationships

- Educator development and capacity development

OUTCOMES

Achievement in terms of

- Knowledge
- Skills
- Behaviour
- Values

Sources: White Paper on Education and Training (1995); National Policy on Whole School Evaluation (2002); Revised National Curriculum Statement Policy (2002); National Policy for an Equitable Provision of an Enabling Physical Teaching and Learning Environment (2008

Educational experiences

- Extended family
- Community
- Sibling-headed household

Input and process quality education indicators

- Adequate funding
- Competent, committed and caring teachers
- Parents who ensure regular school attendance
- Learner's regular school attendance
- Effectiveness of governance
- Provisions of safety and security
- Physical resources and access to school
- Sufficient textbooks and instructional materials
- Learner characteristics
- Support and guidance to help learners develop intellectually and personally
- Strengthening school-community relationships
- National Nutrition Programme
- Relevance of curriculum

Sociocultural context

- Caregiving
- African beliefs and value system
- Poverty

Change in the orphaned learner

- Behaviour of orphans and emotional aspects
- Career choice and aspirations
- Increased responsibility
- Relationship with other orphans
- Relocation of orphaned learner

Figure H: Lived experiences and intended quality education

6.2 LIVED EXPERIENCES IN RELATION TO QUALITY EDUCATION

In this section I discuss the main themes and subthemes that emerged from the lived experiences of orphaned learners in relation to the intended quality education as outlined in Figure F. The following themes are discussed: educational experiences; sociocultural context and change in the orphaned learner.

6.2.1 The educational experiences

In Chapter 1, I indicated that parents are the primary educators and have the responsibility of taking care of the physical, emotional, educational, religious and sociocultural needs of their children. Therefore, when the primary educators are absent in the lives of children, this affects their educational experiences. In this section, I discuss the role of the extended family structure and the community as potential resources in promoting positive educational outcomes for orphaned learners. Added to this, I discuss the sibling-headed household, an emerging phenomenon in African society which contributes to the impoverished educational experiences of orphaned learners.

6.2.1.1 The role of the extended family system

Some of the policies discussed in Chapter 2 highlight the importance of the parent and family in the education of the child. The Constitution of the Republic of South Africa (No. 108 of 1996) emphasises the right of the child to family care or parental care. Further, according to the White Paper on Education and Training (1995), parents have the major role in the education of their children. The White Paper acknowledges that the provision of access to general education of quality cannot be achieved without the cooperation and hard work of, among others, parents (DoE, 1995). This study has shown that when children become orphaned they are moved to live with other family members, and those who are being raised in the extended family are easily absorbed into those families. The African cultural practice of having adult members of the extended family assume responsibility for raising children or assigning children who have lost their biological parent to a close relative (e.g. granny, uncle or aunt) to act as surrogate parent, may be more beneficial to the child's educational experience than being placed in a foster home or orphanage. Additionally, African philosophy holds that the responsibility for raising and supporting children does not fall exclusively on the biological parents and that members of the

extended family are expected to take an active responsibility for the wellbeing of their relative's children (Mkhize, 2004).

Family members provide the love, care and steadfast commitment towards children of relatives. In this way the African family system can serve as a resource in providing educational experiences to meet the basic learning needs of the orphaned learner. As one of the relatives, a 27-year-old man who is taking care of four of his sister's children articulated:

> *You know I have my own needs, a lot of needs and they also have their needs the four of them but I wont leave them I won't give them to anyone I won't allow that to happen, I will do whatever I need to do to take care of them things will be better one day.*

This also demonstrates a sense of interdependence and communalism that characterises African life. As indicated in Chapter 3, the extended family gives its members the emotional security of belonging and knowing they have someone who cares for them. As Foster (2002) puts it, being emotionally cared for is a precondition for educational support. In this way the extended family creates the environment needed for children to be able to attain their full potential, to participate fully in development and to improve the quality of their lives (DoE ,1995).

Furthermore, my study has revealed that school-related responsibilities, such as helping children with homework, are shared with other members of the household, for example older sisters, aunts and uncles as well as neighbours. It was also found that relatives, who do not live in the same household as the learner, assist the learners with homework and take an interest in their academic performance. Furthermore, one granny in this study who was unable to assist her grandchild with school work sought help for her grandchild from the neighbours. Thompson, Alexander & Entisle (1988) confirm that in extended families, school-related responsibilities like monitoring homework might be shared with family members.

6.2.1.2 The community as a source of support

This study has revealed that, apart from the extended family, the community plays a significant role in providing opportunities to support the learning of African children. As pointed in the previous chapter, the neighbours help children in the neighbourhood with homework and young people in the community have committed themselves to helping children with reading and with

homework. This finding confirms Allemano's (2003) assertion that educational quality depends on supporting inputs from the community as well. The community appears to be an important resource in supporting families, particularly those family members who, as a result of low levels of education, are unable to assist their children with school work. Added to this, Grace from a sibling-headed household mentioned that their neighbour has kept their birth certificates in order to help them access social grants.

This finding supports Tendla in Komba (1998) and Venter's (2004), contention that the community and the family are placed at the core of African life: in the African family system children are not the sole responsibility of the extended family but of the entire community (Olinger, Britz & Olivier 2004:6). This is consistent with the concept of ubuntu. An important facet of education in a traditional African setting is that all adults in the community become, in essence, teachers for any child they come into contact with (Reagan 2005:71).

Furthermore, the National Policy for an Equitable Provision (DoE,2008) supports the strengthening of school–community relationships. The Policy recognises the relationship between the school and the community as a dual relationship in the sense that communities are critical contributors to the development of their children's schools, education processes and outcomes. The White Paper on Inclusive Education and Training (2001) acknowledges that learning occurs in the home and the community, and within formal and informal structures. This is consistent with UNESCO's (2004) framework for understanding quality education that focuses on learning. This view of education and training is also in harmony with conceptions of quality education that recognise the importance of respect and engagement with local communities and cultures (UNESCO 2000), as well as conceptions of quality education that involve learners who are supported in learning by their families and communities (UNICEF, 2000).

6.2.1.3 Sibling-headed households

In this study, the sibling-headed household is characterised by a lack of food, a lack of support for learning, an unsafe home environment and absenteeism from school. In such contexts, the rights of orphaned children are being violated: in terms of the Constitution of the Republic of South Africa, 1996 (No. 108 of 1996) the child has the right to basic nutrition, shelter, basic health care services and social services and to be protected from maltreatment, neglect, abuse or degradation.

Lack of food

My study has revealed that African children who are being raised in sibling-headed households go to school without having had food, and that these households rely on food parcels provided by a local community organisation. Added to this, the food parcel is insufficient to sustain the family for the entire month.[20] In this study, a lack of food was not only evident in sibling-headed households but also in the extended family structure, as captured in Thapelo's words: *"I wish at home we had money for clothes and food."*

As indicated in Chapter 3, orphaned children tend to be found in poorer households. The social grants and food parcels that these families depend on are insufficient to pay for basic needs such as food, shelter, water and transportation. International declarations on quality basic education recognise that quality education that satisfies the basic learning needs requires healthy and well-nourished learners (UNESCO 2000; UNICEF 2000). This suggests that, because of a lack of food and in particular nutritious food, learners from these households may not be receiving the intended quality education.

The South African government has responded to this need by providing a nutritious meal for the poorest primary school learners through the introduction of the School Nutrition Programme. The Department of Education's Action Plan on Improving Access to Free and Quality Basic Education for All (2003) and National Policy for an Equitable Provision (2008) point out that the Department of Education aims to provide nutritious lunches for all poor primary school learners on every school day. The target is to have 60% of the poorest Grades R–7 learners receiving quality meals at schools serving the poorest communities by 2012 (DoE, 2008).

Although the primary aim of the School Nutrition Programme is to alleviate hunger, my study has revealed that the meal provided by the school during the day may be the only meal received by these learners for the day, suggesting that the aim of improving learning capacity through the Nutrition Programme may be compromised.

The provision of a nutritious meal is essential; moreover learners in my study refer specifically to *bread* when talking about food, meaning, they may not be receiving a nutritious meal at home.

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[20] Food parcels are received on the last day of each month

These examples confirm this: "*When there is no <u>bread</u> and no money at home we have RDP*" [21] [interview with Thapelo].

> *In the morning they leave without eating but in the afternoon when they come back from school I make sure that they get food I try my best to see to it that they get <u>bread</u>, because in the morning they left without eating* [Grace's sister from a sibling-headed household].

The EFA Monitoring Report (UNESCO 2007:124) contends that ensuring that learners also have access to nutritious food at home reinforces the impact of school-based intervention. The Department of Education report on reviewing the financing, resourcing and costs of education in South African public schools (DoE, 2003b) recommends, among other things, that schools promote ownership of the School Nutrition Programme through initiatives such as school vegetable gardens. It is through such initiatives that schools could provide needy families with a take-home meal.

Support for learning

Support for learning becomes negatively affected when learners lose their parents. For example, when the learners' parents were still alive, mothers used to help their children with homework and encouraged school attendance. As indicated in the previous chapter, learners from sibling-headed households do not receive support or supervision with school-related tasks. This implies that the sibling-headed household does not provide the orphaned learner with the same quality of learning opportunity available to non-orphaned learners.

Furthermore, the school from which I collected data does not have resources to support learners who are experiencing barriers to learning. For example, in the previous chapter a teacher mentioned that one of the learners in Grade 5, who comes from a sibling-headed household, is unable to read because she has not grasped the basic literacy skills dealt with in the lower grades. The school is unable to help this learner because there are no remedial classes. The learning needs of such learners can be addressed through the National Policy for an Equitable Provision (DoE 2008a), which recognises the need to provide basic services in the learning environment to support learning. As the National Commission on Special Needs in Education and Training (DoE,

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[21] RDP stands for Reconstuction and Development Programme. Learners have named the School Nutrition Programme RDP because this was an initiative of the RDP.

1997) asserts, basic services (such as having specially trained teachers to give remedial classes) are either limited or non-existent especially in the majority of schools serving poor communities.

The Whole School Evaluation policy identifies support and guidance to help learners develop intellectually and personally as processes that will help enhance the quality of education. However, if the family and the school are unable to provide the learning support needed by learners, the education system will be failing in realising this goal.

Unsafe home environment

The WSE Policy (2002); National Policy for equitable provision (2008); UNESCO (2000); UNICEF (2000); UNESCO (2004b) UNESCO (2007), declare that the provision of safety and security is a determinant of educational quality. UNESCO (2007) sees the provision of safety at school as one of the key elements of improving learning. Learning environments should be healthy, safe and protective; otherwise children cannot be ready to learn (UNESCO 2007). Quality education implies providing a safe, secure and supportive learning environment to enable learners to focus on learning rather than being distracted by threats to their wellbeing (UNESCO 2004b). The school from which I collected data provides safety and security as required by Policy; nonetheless, my study has demonstrated that orphaned learners are not safe in their own homes. They reside in unsafe improper housing structures and live in fear of their safety because they do not have the protection or support of parents or an older person who can stand up for these children in times of danger. If learners live in fear, they may find it difficult to concentrate in class and this may affect their learning.

In Chapter 3, it was noted that extended families are the first line of protection for children and they continue to form the core safety net for orphans, as they have done successfully for many generations (Heymann & Kidman 2008). In the absence of such a safety net, the educational experiences of learners from these households will be negatively affected.

Absenteeism

As pointed in Chapter 2, the SASA 1996 places the responsibility for ensuring that primary school learners in their care attend school regularly from the first day of the year until the last day of the school year on biological parents and legal guardians. Although SASA's stipulation applies to all learners including the learners in this study, learners from sibling-headed households do not

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attend school regularly due to the absence of a parent or legal guardian to ensure regular school attendance.

The Act defines a parent as the biological parent or guardian of a learner, the person legally entitled to custody of a learner or the person who undertakes to fulfil the obligations of a parent or legal guardian in terms of the learners' education at school. Nonetheless, the main caregivers in the sibling-headed households do not fulfil this requirement as they do not encourage regular school attendance. This was expressed by Maria's sister who is supposedly the guardian: *Sometimes they do miss school, I have a small child so when I have to go and get their grants I have to ask one of them to look after my child because they don't allow us to bring kids there. Most of the time I ask Maria to stay at home.*

The WSE Policy (2002b) regards parents who ensure learners' regular school attendance as one of the quality indicators. Furthermore, this Policy stipulates that the school has to ensure quality teaching and effective assessment of what learners are learning. When learners are absent from school it results in the loss of learning time and effective continuous assessment is compromised. For example, the National Protocol on Assessment for Schools (DoE, 2005b) states that:

> classroom assessment should be both informal and formal. In both cases feedback should be given to learners to enhance the learning experience. Informal assessment is the daily monitoring of learners' progress. This is done through observations, discussions, learner-teacher conferences, informal classroom interactions, etc.

The significant loss of teaching time and the inefficient use of classroom time are indicators of poor education quality, with detrimental effects on learning outcomes (UNESCO 2007:72).

6.2.3 The sociocultural context

This study concerns orphaned learners from an African cultural background. Given that the lived experiences of these learners are inseparable from their sociocultural context, and accepting the notion that quality education should acknowledge the experiences and cultural background that learners bring to the learning environment, I argue that quality education should be understood as a concept grounded in the norms, values, cultures and traditions of individuals and communities. This study identified the following social and cultural practices: care-giving; cultural practices

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dealing with grief and beliefs in the relationship between illness and witchcraft as well as poverty.

6.2.3.1 Care-giving

As pointed out in Chapter 3, care-giving is an inescapable role into which most African children are prepared from childhood. In this study, primary school learners had to miss school for reasons such as having to take care of an older sister's child or accompanying an uncle to hospital. Added to this, some of the children in this study took care of their parents when they were ill. As noted in Chapter 3, traditionally, care-giving and participation in household chores occurred under the supervision of a parent or other older members of the household and it happened in an environment in which children were expected to turn to parents, cousins and aunts for assistance. However, it appears that the cultural practice of care-giving as it occurs in sibling-headed households can impact negatively on the child's schooling owing to the lack of time these children can spend at home doing their school work and the lack of supervision and support for learning by adult family members.

Added to this, given that UNESCO (2004b) recognises that quality education occurs in formal and nonformal environments, care-giving as occurring in sibling-headed households takes place in environments which are not conducive to the formation of individuals' identities, values, morals, knowledge and skills. For example, Grace's 19-year-old sister, who is unemployed and heading the household, relies on her lover to provide money for food. This implies that, in these households, there are no responsible adults to teach children morals and family values or to ensure compliance with these. As pointed out in Chapter 3, every household is an educational setting in which interaction between children and experienced adult family members provides contexts in which proximal development occurs (Moll & Greenberg in Moll, 1990:320). It is through these interactions that children engage in the practices of their community, and in this way acquire and internalise strategies and cultural knowledge important in their own culture. Parents and other family members interact with their children with the intent of bringing about change in terms of morality, values and attitudes in their children's lives.

This means that sibling-headed contexts are unlikely to provide children with environments in which they can acquire and internalise cultural knowledge, morals, values, beliefs and appropriate behaviour. In the absence of parents or relatives taking care of orphans, it may be

improbable that the goal envisaged in the Revised National Curriculum Statement Policy (DoE 2002a) of producing a lifelong learner who is confident and independent, literate, numerate, multiskilled and compassionate will be realised. Furthermore, these children may not benefit from educational opportunities designed to meet their educational needs. Such needs encompass the knowledge, skills, values and attitudes that children acquire in interactions with adult family members. In these contexts, these children may not receive the intended quality of education because conceptualisations of quality reflect the values, beliefs and socially constructed needs of a given community.

6.2.3.2 African beliefs and value system

This study revealed that African orphaned learners believe in maintaining a relationship with the deceased parents, performing rituals relating to grieving, and demonstrating belief in witchcraft and traditional healing practices. As stated in Chapter 3, Africans believe that the dead continue to exist in spirit form and that there is a causal link between misfortune, illness and death. This belief system should be perceived as a way in which Africans view reality.

The White Paper on Education and Training (1995), the WSE Policy (2002b) and the RNCS Policy (2002a) regard having competent teachers as one of the indicators of quality. Added to this, the National Norms and Standards for Educators (DoE, 2000) describes a competent teacher as one who is able to fulfill the various roles outlined in the document; this includes the community, citizenship and pastoral role of the educator. This specific role requires of the educator to show appreciation of, and respect for, people of different values, beliefs, practices and cultures, meaning showing respect for the paranormal beliefs that learners bring into the teaching and learning situation. As Fleer (2004) asserts, when children go to school they take with them the language, knowledge, skills and beliefs from their homes. This view is consistent with an expanded definition of quality education which acknowledges what the learner brings to the learning environment.

Although I acknowledge the cultural beliefs and practices that these learners bring to the learning environment, some of the practices as described below may hinder learning in that they may prevent the child from going through the process of grieving and loss in healthy ways, which in turn may affect the child's ability to focus on learning.

After the 10 days of cleansing ceremony, we stopped worrying about them [parents who have passed away] *and forgetting about them. I don't think about them a lot but there are times when I think about them. I don't know but I used to wear red and white beads, my uncle removed them and he said they must take it somewhere. Yes, it helped me forget.*

As regards the African value system, the narrations of the learners in this study revealed that these children acquired values such as interdependence, self-discipline, as well as respect for adults and an appreciation for education from their interaction with parents as well as with members of the extended family. The core values of respect, harmony, interdependence and unity are the central virtues of African family living (Weisner in Weisner, Bradley & Kilbride 1997:39).

Respect for the elders, which is symbolically carried over to respect for the ancestors, is a common value. Elders and ancestors continue to be symbols of authority and also moral authorities (Shimkin & Uchendu in Shimkin, Shimkin & Frate 1978). This was demonstrated in the previous chapter where learners shared the positive values and morals transmitted by their deceased parents and which they continued to abide by. An example of this is demonstrated in the utterance below:

> *He would say I must go to school, I mustn't smoke, must not take alcohol, I must not be naughty. I used to be very naughty, I used to steal but after my father died on 10 December my mother told me to stop being naughty and since then I stopped up to today* [Nkosinathi].

Furthermore, the importance of education has emerged as attributing to the future aspirations of these learners. It became apparent from these learners' narratives that schooling is not only important for the individual but also influences the futures of the other siblings, thus implying that the older siblings will need to provide for the education of their siblings. This suggests that a child's view on life is rooted in the values, norms, beliefs and traditions of his/her family and community: *"I want to finish school and help my brother; he is 9."*

These are important quality education aspects which should be acknowledged and nurtured in the learning environment. In an environment that creates quality education, learners are affirmed for their existing knowledge (e.g. cultural knowledge of dealing with grief) and values (UNESCO, 2004b). Furthermore, the school–family link is especially significant as quality begins at home,

where values are first learnt (UNESCO 2003). Hickson and Kriegler in Hirasawa (2007:15) argue that in order to understand the lived experiences of African children, it is important to understand the African value system and norms. Smith & Ngoma-Maema (2003:350) further argue that values play the greatest role in the evaluation of school quality. Values and the knowledge base shape the way in which a given culture understands educational quality and performance.

6.2.3.3 Poverty

The prime characteristic (input) that the orphaned learners in this study bring to the teaching and learning environment is their poor socioeconomic background. As indicated in the previous chapter, the children in this study come from families where the main caregivers are unemployed, they rely on social grants and food parcels from the community organisation and there is often a lack of food. While these families are faced with poverty, the school also requires that parents or guardians pay an annual school fee of R100 to secure the child's place for the following year.

This is the reality despite the stipulation in the Amended National Norms and Standards for School Funding (2006) that there should be no fees paid in schools serving the poorest communities: "*school fees must not be allowed to become an obstacle in the schooling process, or a barrier preventing access to school especially as far as the most marginalised are concerned*" (DoE 2006:45), and the Plan of Action for improving access to free and quality education (DoE 2003a:8) declares that "public funding of schools, especially where learners are poor, must be sufficient to cover the cost of all basic inputs required for a quality education" and " no poor school should need to charge school fees owing to inadequate public funding" (DoE 2003b:24). Furthermore, the school from which I collected data has been listed in *Government Gazette* No 30524 of December 2007 as a no-fee school although it requires parents and guardians to pay school fees.

Pampallis (2008:14) points out that although schools in poor communities tend to have very low fees of R100 or less per year, payment of school fees proves to be burdensome for many parents. Apart from school fees, grandmothers and sibling-heading households bear the burden of other costs associated with schooling. In the same way, Hall & Monson (2006) argue that the non-implementation of fee exemption by schools is the result of a systemic problem in the conceptualisation of the programme in that the Department of Education has not budgeted to compensate schools for loss of revenue through fee exemption. They further contend that even if

schools were forced to implement the no-fee policy, it would result in a loss of income and an inability to buy the resources they require, as well as to employ more staff to reduce learner–educator ratios, which in turn may severely hamper the quality of education. Added to this, the poorest schools are prohibited from raising money by charging school fees or other charges to augment their budgets, which would enable them to employ better qualified teachers and maintain small classes (OECD 2008). Therefore, the quality of education in the poorest schools is compromised by this prohibition. Nonetheless, I strongly believe that even if the parents in poor schools could pay school fees, the R100 per year is minimal and might enable these schools to reduce teacher–learner ratios by employing additional teachers and also hiring better qualified teachers. Furthermore, the poorest schools need far more resources than the increased budget can offer.

The Action Plan for improving access to free and quality education for all (DoE 2003a), stipulates that

- public funding of schools, especially where learners are poor, should be sufficient to cover the cost of all the basic inputs required for a quality education

- no learners, especially those of compulsory school-going age, should experience any economic, physical or other barriers to attending school

However, the OECD report (2008:162) asserts that public funding of schools for the poor is insufficient to cover all costs associated with schooling. Payment of transport, uniforms, excursions, stationery and additional learning materials will still put a considerable burden on poor families, (especially families that rely solely on the social grants provided by government). The cost of uniforms and transport in particular might be a barrier to access and to daily school attendance. In the case of transport, the distance travelled to and from school, the safety the learner as he or she travels to school, and excessive fatigue impact on the child's ability to learn (ibid).

As pointed out in Chapter 2, the no-fee policy has resulted in increased allocations; nonetheless, it appears to have done little to help the historically disadvantaged schools to bring about quality improvements. Many poor schools operate on budgets that do not enable them to provide quality education, suggesting that the poor will continue to have unequal access to quality educational opportunities, thereby perpetuating the inequalities in the education system. As Harvey (1995)

contends, quality requires equitable experiences. However, this cannot be realised while there are huge disparities across schools and the budget allocated to the poorest schools is insufficient to meet the learning needs of all learners. Additionally, UNESCO (2004b) contends that to ensure the provision of quality education requires sufficient resources although the HIV/AIDS pandemic is placing increasing demands on such resources. Similarly, the National Policy for an equitable provision (DoE, 2008) recognises the need for additional resources such as holistic counselling and pastoral care in schools. UNESCO (2003) acknowledges that education systems are experiencing changing demands and expectations, and as a result, education is expected to make a contribution to addressing a range of concerns (such as how orphanhood impacts on education quality) relevant to the current conditions and challenges facing society.

6.2.4 Change in the orphaned learner

As indicated in the previous chapter, before learners became orphaned, their lives were characterised by love, joy, nurturing, protection and encouragement. They lived emotionally and physically fulfilling lives. When they talked about their deceased parents they referred to the emotional and material inputs. Mothers were described in terms of their warmth, care, creating a warm and pleasant environment, and instilling positive attitudes towards school. Fathers were seen as providers of material inputs such as food and clothing.

A turning point occurs in their lives when their parent(s) die resulting in the deprivation of these inputs. Their emotional experiences changed to being fearful of losing their current main caregiver, they experienced pain, sadness and longing for their deceased parents while others resorted to the use of drugs to cope with grief and others suffered rejection by peers.

As indicated in Chapter 2, quality education may have a different meaning to different people in different environments, and at different times. In this context, quality education would have a different meaning for these learners *before* they lost their parents and *after* they became orphaned or even during the period when their parents were ill and unable to take care of them. Given the different experiences that occur in the lives of these learners at different times, I concur with Adams (1993) who maintains that quality education is a dynamic concept, which changes and evolves with time, and changes according to the social, economic and environmental context.

6.2.4.1 Behaviour of orphans and the emotional aspects

This study has revealed that orphaned learners are experiencing emotional problems such as grieving and are engaging in inappropriate behaviour such as the use of drugs and teachers seem not to know how to identify or cope with psychological and social problems. For example, in this study, a Grade 4 learner was involved in drugs but the teacher simply described this child as a naughty child, without attempting to determine the reasons for the poor behaviour in class. As Sengendo & Nambi (1997:106) contend, psychological problems are not easy to identify, and many adults (including teachers) in charge of orphans are unable to identify such problems and lack the knowledge for dealing with them appropriately.

Furthermore, teachers seemed uncertain of how to handle grieving children in their classrooms, even though the roles of educators as stipulated in the Norms and Standards for educators (2002) assume that teachers have the competence to deal with the current magnitude of emotional problems faced by orphans and that they are in a position to counsel and tutor learners in need of assistance with social or learning problems.

In a similar study, Ogina (2008) points out that the teachers she interviewed in her study appeared not to be aware of the pastoral role they are expected to fulfil. Given this observation, it appears that government assumes that what the Norms and Standards Policy intends will logically and naturally move from intention to realisation within schools and classrooms. However, this is not the case as Christie (2008:115) contends "… policy implementation is a complex process and policies seldom turn out as envisaged". Christie (2008), in referring to policies developed in South Africa post-1994, asserts that these policies were formulated in terms of what is ideal without giving sufficient attention to the implementation and support required in the various contexts.

Furthermore, although the WSE Policy (DoE, 2002b) identifies the provision of guidance and counselling as one of the indicators of quality education, the school from which I drew participants did not provide counselling services to address the current emotional and social needs of orphaned learners. Quality education means providing a learning environment that is conducive to the education of all learners, regardless of their family background or status of being orphaned (UNAIDS 2006: 17). In this context, providing such a learning environment would require quality inputs such as the provision of professional counselling services in schools,

particularly in schools serving poor communities and also external mediation such as the services of social workers and churches.

Furthermore, a "conducive" learning environment implies among other things that the inputs of "educator development and capacity development" mentioned in Figure F should seek to include a pastoral care programme in the pre-service and in-service training of educators. Teachers are essential players in promoting quality education, whether in schools or in more flexible community-based programmes; they are advocates for, and catalysts of, change (UNESCO 2000:20). Educators need to understand the responsibilities that they have towards learners, both as key mentors in the learning process and as adults who serve as important role models and as protectors of children and need to be more sensitive in meeting each learner's right to a quality basic education (UNAIDS 2006:26).

6.2.4.2 Relationships with other orphans

This study has revealed that orphaned learners associated with other orphans, perhaps because they needed to belong to a group in which they share similar experiences. They needed a social support system which, according to Louw and Edwards (in Du Preez 2004: 53) refers to the perception of comfort, care and help that individuals receive from other people. Orphaned learners mentioned peers at school as people who provide the comfort and care they need. It is apparent that peers play an important role in the emotional care of orphaned learners. In this context, the provision of care, support and friendship to orphans by their peers would be perceived as supporting inputs to quality education. On the other hand, when orphaned learners are isolated by other learners, as one of the teachers indicated, this discriminatory attitude becomes a barrier to learning.

6.2.4.3 Increased home responsibilities

Learners in this study experienced increased chores and other responsibilities at home as a result of losing their mothers. Learners like Thapelo aged 11 helps his younger sister get ready for school, helps with the cooking and washing of clothes and accompanies his uncle to hospital and to school meetings. As indicated in the previous chapter, some of the learners had to take care of their mothers while they were ill. These responsibilities affect the time available for such learners to focus on their school work. The actual time spent learning subject content either in school or as part of homework has been identified as an important factor affecting learner performance

(UNESCO 2007:72). In promoting quality education that seeks out learners, schools need to work with families and communities to help nurture and support orphaned children's learning.

6.2.4.4 Relocation of orphaned learners

This study has revealed that when both parents die, some children are moved from their parents' home to their grandparents' home. In the case of Foustina (cf. Chapter 5), the parents lived in an informal settlement on the outskirts of a township while the grandmother lived in the old section of the township. Relocation for this learner meant that she had to walk for almost an hour to get to her school which is located in the informal settlement. Furthermore, as these learners are taken in by impoverished grandparents, these grandparents cannot afford to meet transport costs. Mashiri, Zukulu & Buiten (2005) argue that for many children in South Africa who live in poverty, the unaffordability of transport impacts on children's opportunities for accessing and benefiting from education in that the distance that learners travel to school impacts negatively on their energy levels and punctuality in arriving at school.

This is a reality even though the Plan of Action for Improving Access to Free and Quality Basic Education for All (DoE 2003a) specifies the intention of the government to ensure that the poorest learners experience improvements in the quality of schooling they receive and that all barriers to access including <u>distance</u> are removed.

Additionally, government states that no poor learner should be further than one hour away from the closest school offering the grade he or she must attend.

This Policy is rarely implemented in township schools because relatives may choose to move a child from his or her parents to provide the love, care and material support that the parent cannot provide. Added to this, it may be impractical to implement this policy because orphaned learners do not move from one location to another out of choice and it may not be advisable for the learner to change schools during the year owing to the death of parents. Furthermore, these learners may need to continue with already established supportive friendships which they need for emotional support. I concur with Christie (2008) who maintains that although policies offer possibilities for change, the context of implementation has a great influence on policy practice.

6.3 DID THE ORPHANS IN THE STUDY EXPERIENCE THEIR EDUCATION AS QUALITY EDUCATION?

All learners, whether orphaned or not, living in impoverished communities and subjected to the kind of disadvantages in operation in informal settings are at risk of an inferior quality of education. Being an orphan can aggravate this. No claim is therefore made that learners in informal settings receive the type of quality education envisaged in policy documents. Having said this, the study set out to interrogate the situation of the orphaned learner in such a setting with the aim of pointing out the factors that could further put orphaned learners at a disadvantage.

As pointed out, factors identified by this study as aggravating circumstances in the case of an orphaned learners are: living in fear of losing their main caregivers or in fear for their own safety and the safety of their brothers and sisters; emotional problems such as grieving; rejection by peers; being absent from school; increased home responsibilities; being raised by siblings; and witnessing the prolonged illnesses of their parents leading to death. Such experiences would produce outcomes different from those stated in Figure E. I concur with Christie (2008:164), who points out that the learning experiences of learners produce different learning outcomes depending on factors such as the experiences that learners bring with them to school from their homes and families, the schools they attend, how well their schools function and how effective their teachers are and what happens inside the classroom in terms of teaching and learning.

Although the White Paper on Education and Training (1995), the National Norms and Standards for School Funding (1998) and the National Policy for an Equitable Provision (2008) state that quality requires equitable experiences, and that state resources should be provided on an equity basis so that all learners have access to equal educational opportunities, orphaned learners do not have the same educational opportunities as learners who have parents.

Nonetheless, I acknowledge that some of the policies discussed in this study have created enabling conditions for quality improvements through, among other things, the National Norms and Standards for School Funding, which recognises that socioeconomically disadvantaged learners require adequate funding in order to advance the equality of quality in South African schools; the Amended National Norms and Standards for School Funding, which recognised the need to abolish school fees in schools serving the poorest communities and the National Policy for an equitable provision which seeks to ensure that the poorest learners in Grades R to 7 receive

a nutritious meal through the School Nutrition Programme. These inputs are essential in addressing the needs of the poor, including those of orphans. However, such initiatives are insufficient to meet the learning needs of the children described in this study.

In this study, quality education is understood as being one that satisfies basic learning needs and enriches the lives of learners and their overall educational experience. In the light of the African philosophy of life, quality education that enriches lives of learners would mean

- having learners and teachers who respect one another
- being able to share with others and care for others, and show compassion, kindness, empathy
- educators and schools that are committed to meeting the learning needs of all children for the good and well-being of the learners as well as the community
- orphaned learners who are well fed, clothed and housed in secure homes, in good health, loved, feeling secure, and able to treat others with fairness and humanness

Furthermore, creating an enabling teaching and learning environment that enriches the lives of learners would mean showing appreciation and respect for the values, beliefs, practices and cultures of learners, their families and the community.

In addition, my study acknowledges that quality education does not focus only on the cognitive aspect of the learner but includes other aspects such as values, skills and attitudes. As pointed out in chapter 2, quality is grounded in the cultural traditions, social relations, economic and political life of specific cultures. In the traditional African culture, education, cannot, and should not, be separated from the way African people experience life itself. The philosophy of education in South Africa needs to take into account the contribution that an African philosophy of life can make to the transformation of educational theory and practice. An African philosophy, with its concern for a better quality of life for all, could provide a framework for understanding holistic quality education.

Added to the above, in the light of the international declarations on quality education, the Constitution of the Republic of South Africa, South African government education policies and legislative frameworks, and the African philosophy of life, my study embraces a holistic inclusive education and training system – the kind of system that

- o recognises that everyone has the right to learn
- o accepts and respects the fact that all learners are different and have different learning needs
- o acknowledges that all children can learn and need support to develop their full potential
- o education and training are broader than formal schooling and that learning also occurs in the home and community (DoE, 2001)

In the context of orphaned learners, a different conceptualisation of quality education is required. Quality education in one that provides a learning environment that is conducive to collaboration between schools and families and communities in order to assist children with school work, provide professional guidance and counselling services to deal with current issues and have teachers who are well equipped to deal with grieving children in their classrooms.

According to UNICEF (2002) education quality means learners who are "… *supported in learning by their families and communities"*, suggesting that if the family does not provide the support needed for learning, learners from these households would not receive education of the same quality as those whose families provide this support. This finding further confirms the point raised in chapter 2 that quality is not a fixed, objective standard to be applied universally or across all South African schools. Quality education needs to be locally defined, not only nationally but at the school and community level, because quality is influenced by local physical conditions and circumstances such as families headed by young siblings (Leu 2005:10). Furthermore, quality education needs to acknowledge unusual experiences that learners bring to the teaching and learning environment, experiences which may hinder learning.

In the light of the research undertaken some salient points emerged. For orphaned learners to experience education as quality education two essential criteria must be satisfied:
Quality education that seeks out orphaned learners by seeking out ways in which schools can partner with extended family members who would serve to support orphaned learners emotionally, ensure regular school attendance, provide love, care and material needs for these learners.

Quality education that acknowledges what the learner brings to the learning environment, such as African values, cultural knowledge and traditions, previously unusual experiences such as increased familial responsibilities, and primary school learners who are being raised in sibling-

headed households. UNAIDS (2006:15) maintains that much of what was learnt in homes such as customs and traditional knowledge could be lost if education systems do not consider how to ensure that this is passed to the next generation.

Figure I: Conceptions of quality education resonating with lived experiences of orphaned learners

Possible indicators of education quality inferred from the lived experiences of orphaned learners

FAMILY INPUTS:

- Having nutritious meals at school and at home
- Living in safe and secure homes
- Relatives who would provide the warmth and nurturing support to the child
- Relatives acting as surrogate parents who would ensure regular school attendance, who value education, motivate and instill positive attitudes in children

SCHOOL INPUTS:

- Educators who have the knowledge and skill to respond appropriately to the needs of orphaned children
- Provisions of on-site guidance and counseling at school

COMMUNITY INPUTS:

- The local community and school community that can provide sustainable direct support to children's leaning
- Peer groups with similar experiences who can provide the emotional support

6.4 SUGGESTIONS FOR FURTHER RESEARCH

This qualitative case study on the lived experiences of orphaned African learners provided a framework from which descriptions of education quality can be derived. Working from the premise that educational quality depends on the supporting inputs from the family, the community and the education system (Allemano 2003), the role of the *extended family* in providing the shared care-giving, emotional support and assistance with school work, the values inculcated by the family and that of the community emerged as a critical resource in supporting learning. Given the limited number of case studies and lack of comparative information, further investigation may be required on aspects of the extended families and that of the community that can contribute to education quality. Further research can explore the needs of sibling-headed households versus those of other types of households for special support.

Teachers are facing a new and growing challenge of having to deal with grieving children in their classrooms. Thus further research is required to understand how teachers experience teaching in the context of the increasing number of orphans.

6.5 CONCLUSIONS AND RECOMMENDATIONS

This study indicates that, by studying the lived experiences of African orphans from poor-resourced communities, a better understanding of the quality of education received is made possible and this in turn could influence the conceptualisation of quality education and support structures needed to achieve this ideal. Emanating from the findings, different kinds of additional support for orphans and other vulnerable learners and their families can be identified that could enhance the quality of learning and quality of life of these learners.

Given that the quality of learning depends on learner behaviour, this study has shown that being orphaned could impact negatively on the intended quality in education because of the negative inputs that orphaned learners bring with them into the teaching and learning situation. The behaviour displayed by orphaned learners, emotional changes resulting from changing family circumstances, grieving the loss of parents and fear of losing the caregiver may impact negatively on the intended quality of education. While orphaned learners are experiencing emotional changes, this study has shown that teachers do not have the capacity to respond appropriately to

the emotional needs of orphans nor are they able to tutor learners with learning problems as required by the Norms and Standards for Educators.

Given the increase in the number of orphans in schools, it may be prudent for the Department of Basic Education to consider the appointment of part-time Educational Psychologists and Social Workers to provide on-site pastoral support to learners at these schools. Educational Psychologists could play a meaningful role not only in counseling skills but in bereavement counseling while social workers could among other things assist learners and their families to access social grants. This ideal could be achieved by the government implementing what De Clercq (1997) refers to as regulatory or procedural policies – policies that guide action through laws and regulation.

The study has indicated that orphaned children make use of their friends for support during the grieving process. Furthermore, they believe in cultural practices of dealing with grief and beliefs in the relationship between witchcraft and illness. One suggestion would be that schools could collaborate with affected families to identify older siblings who could be trained in counseling skills and support. It is through peer support structures that children can be assisted to integrate other ways of grieving into indigenous African cultural practices. As demonstrated in this study, norms and traditions surrounding death play a role in suppressing children's memories of lost loved ones.

One of the findings in this study was that orphans from sibling-headed households do not live in safe environments. In this case School Governing Bodies could work with members of the community to provide a safety network for these households. Further, the school document mentioned in this study indicates that community leaders had engaged the provincial department of education to build them a school. Therefore, the community leaders could work with the local police to initiate a community policing forum in order to provide secure environments where these learners and those from child-headed households live. Through community involvement can their awareness of social support networks be broadened.

Furthermore, orphans raised in sibling-headed households, where the primary educators (e.g. parents or surrogate parents) are non-existent, experience an impoverishment of their educational experiences because the parent is no longer available to supervise the child's homework and other educational activities. To this end, the school could draw on the positive supportive inputs of the

community, for instance by identifying retired teachers and unemployed young adults to respond to the educational needs of orphaned learners from these households.

Finally, this study has made an important contribution in increasing awareness of the lived experiences of orphaned learners. Through in-depth engagement with orphaned learners, their caregivers and educators, new insights were gained into the role that the extended family and of the community could and should play in concert with the formal school and welfare systems to help improve the quality of education of orphans and other vulnerable learners. It is hoped that some of the findings and recommendations will lead to better understanding of the needs of orphaned learners, so that the support systems and structures that are developed help these learners gain access to the kind of quality education they need.

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