

CHAPTER 2

RESEARCH METHODOLOGY

2.1 INTRODUCTION

In this chapter a discussion is presented on how data were collected and analysed to identify emerging themes that provided insight into the changing role of the educator. I used the research questions raised in the previous chapter, namely, *What are the lived experiences of orphaned learners and how do educators experience and respond to emerging needs of orphaned learners?* with the intention of exploring the learners' experiences and expectations, and to discover how the educators identify and respond to the needs of the orphaned learners. My aim was to generate grounded theory that explains the role of educators in responding to the needs of orphans, based on the empirical data from the orphaned learners' and the educators' lived experiences.

The research design described in this chapter includes the paradigmatic assumptions that underpinned the research methodology, the way in which I selected the site and participants for the study, the data collection methods I used and the data analysis strategies implemented. I account for how I addressed the issue of research quality and explain my role as a researcher. I also discuss the ethical considerations that I adhered to.

2.2 PARADIGMATIC ASSUMPTIONS

Many studies of children portray them as passive victims of their situation or objects of investigation; in reality children are capable of defining what they think, experience and expect (Mahon et al., 1996; Kitzinger, 2001; Fielding & Prieto, 2002). In recent years there has been a paradigm shift from adults observing children and recounting their experiences to researchers seeking information directly from children (Driessnack, 2006). Researchers who interview children give children a voice to express their own

interpretations and thoughts, instead of merely depending on adult interpretations of the children's lives, which may indeed not be accurate (Mahon et al 1996; Eder & Fingerson, 2002; Fielding & Prieto, 2002). Scott reminds us that:

The best people to provide information on child's perspective, action and attitude are the children themselves. Children can give reliable account of events that are meaningful to them (Scott, 2002:99).

Imelda Coyne concurs with Scott and remarks that:

Increasingly there is growing acceptance that children have the right to be consulted over decisions affecting them and have their views taken into consideration by adults (Coyne, 1998:409).

The work by Scott, Coyne and other researchers illustrates that children are social actors and are capable of constructing their own reality through the process of making meaning of their lived experiences. The study done by Howard and Gill (2001) is an example of how children construct meaning of citizenship and national identity. The research was inspired by a lack of consideration of the ways in which children conceptualise their own identity. Through the analysis of the children's talk, Howard and Gill (2001) were able to deduce how the children in their sample constructed their national identity.

Another example is Francis's (1997) study on primary school children's construction of gender and power. In his study, data was generated through children's group play and interviews. The findings revealed that the children's constructions of gender and power were differentiated according to their experience of masculinity and femininity. Boys' construction of gender was empowering while the girls constructed gender as disempowering.

Apart from interviewing children, draw-and-write techniques are a bottom-up approach that enhances the participation of children in research and presents opportunities to explore the meaning of children's experiences (Backett-Milburn & McKie, 1999). According to Yuen (2004), drawing gives children a voice to express their observation

and interpretation of their experiences enabling the adult researcher to understand the children's perception better. Driessnack (2006) used draw-and-tell conversations as a research method that is child-centred and child directed, arguing that traditional observation, directed interviews and questionnaires are adult dominated and biased.

The search for alternative data collecting strategies that involve children is motivated by the fact that adult researchers who research children are often faced with the challenge of presenting the children's perspectives rather than imposing their own interpretation on the children's experiences (Yuen, 2004). Driessnack (2006) used draw-and-tell conversations with children about fear to provide insight into how children describe their experiences. The research findings revealed that the use of drawing increased the amount and nature of the information that the children shared compared to the use of other methods such as observation and interviews. The work of these researchers and others demonstrate how I, as a researcher, can include children in my study and approach the research problem by placing the study within the interpretivist/constructivist paradigm.

The methodological approach in interpretivist/constructivist paradigm sets guidelines that enabled me to deconstruct the realities of how orphaned children made sense of their lived experiences in terms of their needs, and how the educators experienced the learners' needs and responded to them. I blended insights from the interpretivist and constructivist paradigms because the two paradigms are focused on the process of interpreting and creating meaning from the participants' unique lived experience. Within the interpretivist/constructivist paradigm, reality is subjective and constructed (Crotty, 1998). This implies that what the orphaned learners and their educators constructed as their experience was real and since they had different experiences multiple realities emerged.

Constructivist researchers assume multiple realities based on their belief that reality is constructed on personal experience, which differs from one individual to the next (Crotty, 1998; Charmaz, 2000; Trochim, 2001; Terre Blanche & Durrheim, 2002; Denzin & Lincoln, 2003). The research done by Attanapola (2003) on the health of female workers, demonstrates the existence of multiple realities gleaned from listening to the participants'

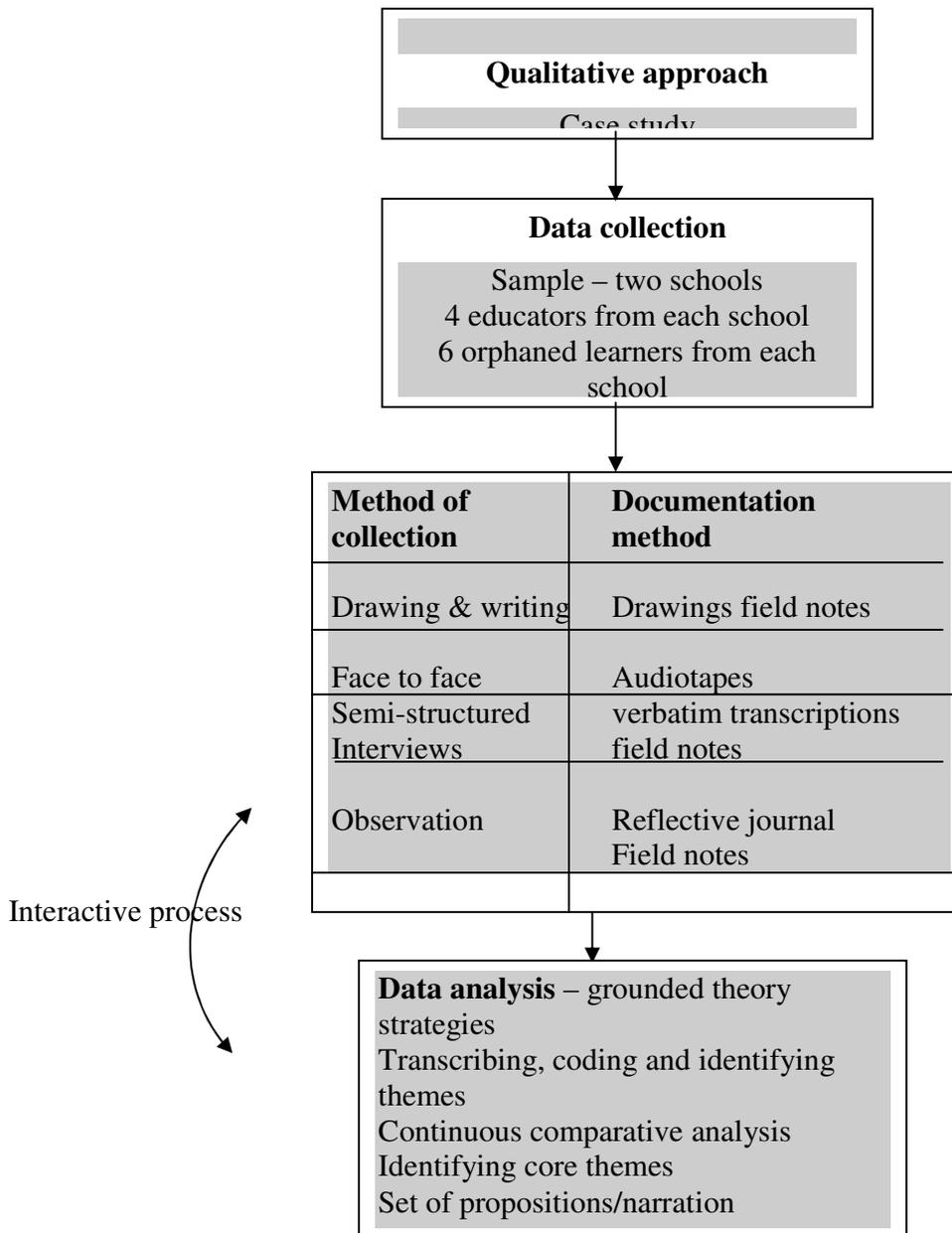
voices on their experiences and perceptions of health. Likewise, Barry (2002) found that by using different methods to collect data he was able to bring out different versions of reality from the research participants. These studies illustrate the existence of multiple realities, which can be sought by exploring the lived experiences of the participants in the study. In this study I believed that reality and knowledge about how the needs of orphans are managed could be established by exploring how the educators working in schools with orphaned learners make sense of their daily experiences with the orphans and how they construct knowledge of the needs of the learners.

In beginning, to understand the realities being constructed, we need to see the world through the eyes of these learners and their educators, and to analyse the meanings constructed, based on their lived experiences. To see the reality of the participants I explored the views of the learners and the educators by listening to different voices representing different experiences and realities to identify diverse perspectives of the experiences. I weighed up different versions of reality to gain a balanced perspective; then built up a comprehensive explanation of the phenomenon from the multiple versions of lived experience of the learners and the educators.

The interpretive and constructivist paradigms that guide this study complement each other when it comes to the researcher-participant relationship. Whereas in the interpretivist approach the researcher creates a trusting relationship with the participant that enables the researcher to explore their experiences, the constructivist recognises mutual interaction between the researcher and the participant in constructing a meaning (Crotty, 1998; Terre Blanch & Durrheim, 2002; Denzin & Lincoln 2003). I, as an interpretivist and constructivist researcher, combined both strategies in my study by taking an active role of co-creating a meaning during the data collection and analysis processes, and the interpretation of the data. I established rapport before commencing the data collection process and throughout the entire research process.

2.3 THE RESEARCH PROCESS

Figure 2.1: Research process⁵ flow chart



⁵ Dates of field visits (see Appendix E)

To answer the research questions and generate grounded theory, I obtained in-depth perspectives of the orphaned learners and their educators to better understand and explain the activities in the schools (Cohen, Marion & Morrison, 2000; Trochim, 2001). I chose a qualitative research approach to this study because qualitative inquiry focuses on understanding the meaning people attach to their lived experiences (Merriam, 1998). The qualitative research approach made it possible for me to explore the lived experiences of the orphans and their educators by building a trusting interactive relationship that encouraged the learners and their educators to talk about their perceptions and opinions.

The strength of the qualitative research approach was that I was able to collect rich descriptive data and details from the participants, such as feelings, thought processes and emotions – which cannot be achieved using quantitative research methods (Strauss & Corbin, 1998; Merriam, 1998; Marshall & Rossman, 1999). By using data collection methods that are flexible and sensitive to the underlying meaning of the participants' experiences (Merriam, 1998) I was able to explore the needs of the orphaned learners and the way in which the educators experience and respond to the orphans. Another reason for choosing the qualitative research approach is that the research was conducted in the participants' natural setting, which provided holistic understanding of the behaviour of the learners and the educators as it occurred naturally (Babbie & Mouton, 2001).

One of the challenges of using a qualitative research approach was that collecting rich descriptive data required me to employ interactive methods, such as drawing-and-writing techniques, the individual interview and observation, each time we interacted, which was a time-consuming process. Another aspect of the qualitative research approach is that the researcher is the primary instrument for data collection and data analysis (Merriam, 1998). It is therefore essential that the researcher should have knowledge and training on how to do observation and conduct interviews. In preparation for my study, I attended research support sessions that prepared me for conducting interviews and making observations. In the qualitative research approach there is a possibility of researcher bias owing to lack of rigor in the research process. To ensure rigor in my research process, I

used a reflective journal (Appendix B) and memos (Appendix F) to record and reflect on the details of the choices I made in sampling, and how I collected and analysed my data.

2.4 DATA COLLECTION

This study is a case of the experiences of orphaned learners and their educators. Selection of schools in which the data was collected was done before the selection of the participants.

2.4.1 Identification of the data collection sites

In the process of identifying the schools from which I collected the data, I approached the BEd Honours students from the Faculty of Education, University of Pretoria, during one of their contact sessions and shared my research interest with them. Most of the students were educators currently teaching in different primary and secondary schools in South Africa. Some of the students confirmed that they had many orphaned learners in their schools and they volunteered to be my gatekeepers. The students made appointments for me with their school principals so that I could visit their schools and explore the possibility of collecting data from some of these schools.

I used convenience sampling in selecting the schools that were accessible and where I could make multiple visits to saturate my data (Stake, 2000). The criterion for choosing the two schools was that the schools had orphaned learners and educators who were willing to participate in the study. A convenience sampling strategy takes cases according to their availability especially when it concerns a rare phenomenon, such as in the case of this study, schools with orphaned learners (Kelly, 2002). The advantage of choosing convenience sampling was that it was convenient for me as the researcher to access the site and the participants (Fraenkel & Norman, 2006). The disadvantage of convenience sampling is the possibility of the researcher being biased in selecting the site and the participants. Another disadvantage of convenience sampling is that the sample may not

be representative of the population under study (Trochim, 2001; Fraenkel & Norman, 2006). The issue of representation in convenience sampling is more likely to be a limitation in studies that intend to generalise findings. The main purpose of this study, however, is to explore how educators identify and respond to the needs of orphaned learners with the aim of providing insight and understanding of the phenomenon, and not necessarily to generalise the findings to other settings.

To gain access to my data collection site, I got the relevant telephone numbers for four schools from these students and contacted the school principals. Two of the four principals declined to participate in this study. The principals of the other two schools agreed to be involved in my study and were willing to assist me in identifying orphaned learners and educators who would be willing to participate in my research. To conceal the identity of these two schools for this research study, I refer to them as School A and School B.

School A and School B are both in Mpumalanga Province. To gain access to school A, I sought permission to conduct my research from Kwamhlanga North East Circuit Office and for School B the permission was obtained from Tweefontein North Circuit (Appendix D). In my study, School A and School B were used as research sites to provide better understanding of how the needs of orphaned learners are identified and managed (Merriam, 1998; Stake, 2000). The reason for using two schools was to enable me to gain an in-depth understanding of the phenomenon under investigation by exploring the meaning of the lived experiences of the learners and educators who have experienced or are experiencing the phenomenon within a bounded system – which in this case is a school (Merriam, 1998; Stake, 2000).

The case study approach applied to this study provided rich descriptions of the lived experiences of the learners and educators who participated in the study. I explored, examined and compared the common and uncommon experiences of these learners and educators in terms of what was happening, the relationships that existed and the overall

situation in the two schools (Stake, 2000). The advantage of a case study is that it presents a real-life situation, and provides a holistic account of the phenomenon and insights that would enable the reader to visualise the experiences of the people in the phenomenon (Merriam, 1998). The limitation of the case study research approach in this study is that one case study in either of the two schools may not produce findings that can be generalised to other schools (Lewis & Lindsay, 2000).

2.4.2 Selection of the participants

The selection of learners to participate in the study was done through purposive sampling. The rationale for purposive sampling is to seek information-rich cases to provide in-depth understanding of a phenomenon (Patton, 2002). Purposive sampling was a suitable strategy for this study because the objective of the study was to explore the lived experiences of the orphaned learners and the educators to provide an understanding of how educators identify and manage the needs of the orphaned learners. The advantage of purposive sampling is that the researcher selects the participants based on the purpose of the study (Trochim, 2001) thus choosing participants who have experienced the phenomenon and have first-hand information relevant to the study.

Purposive sampling is convenient because the researcher is able to reach the participants quickly (Trochim, 2001). Since it is the responsibility of the researcher to choose participants who are able and willing to provide the relevant data, there is a possibility that the researcher could be wrong in choosing suitable participants for the study (Fraenkel & Norman, 2006). Taking this limitation into consideration, in this study I informed the principal and deputy principal of the two schools visited of my research so that they could assist me in identifying educators and learners with information needed for the study. Another disadvantage of purposive selection is that given the intensity of the data collection procedures, only a few cases are involved in the study (Patton, 2000). To address the limitation of small numbers of selected cases, I used more than one data collection method to elicit the in-depth information required in this study.

I also used purposive sampling in the draw-and-write session to identify learners who had the potential of narrating rich in-depth experiences of their orphanhood. Children's drawings can be a way of understanding the views of a child (Dockrell, Lewis & Lindsay, 2000). Through drawing as a data collection technique, children get the opportunity to organise their narratives before they share them with the researcher. The drawings also give form and meaning to the familiar and unfamiliar experiences of children (Driessnack, 2006). Some researchers view drawing as a relaxing exercise that reduces an individual's defensiveness and enhances communication (Backett-Milburn & McKie, 1999; Yuen, 2004; Driessnack, 2006). The advantage of using drawings encouraged children to talk more on sensitive issues and stimulates detailed descriptions of specific emotions and experiences (Yuen, 2004; Driessnack, 2006). The strategy of giving the learners the opportunity to draw before verbal interaction empowers the child when the drawings are used to guide the interview. The researcher focuses on the issues that most matter to the child being interviewed and the drawings also structure the interview (Backett-Milburn & McKie, 1999; Yuen, 2004; Driessnack, 2006).

Although draw-and-write techniques have several advantages, one needs to be aware of the limitations. Backett-Milburn and McKie (1999) argue that drawing techniques assume that children are able to draw and does not take into consideration that drawing requires knowledge and skills. Moreover, a child may not like to draw or feel that they can draw (Yuen, 2004). In such cases the children should have other ways of expressing themselves. Backett-Milburn and McKie (1999) indicate that the environment of the child might influence the pictures the child draws, for instance peer pressure and the desire to please the teacher. Hence, the drawings may not reflect the state of the child's mind. Drawings, being one way of exploring the child's experience, may be difficult to interpret. The researcher might interpret the message differently from what the child intended to express (Dockrell et al., 2000). To limit the risk of misinterpreting the children's drawings and the environmental influence on what children draw, it is a good idea for the drawer to interpret the drawing and give it meaning (Backett-Milburn & McKie, 1999). In this study the learners were given the opportunity to explain what the drawings meant and to express their own concerns in the absence of environmental

influence to increase credibility. My intention in using the drawings was to identify the learners who were willing and able to narrate their experiences and to probe for in-depth information rather than for interpretation of the learners' experiences that could have required a qualified psychological analysis. In this study, drawings and writing were used as an icebreaker in the face-to-face semi-structured interviews (Backett-Milburn & McKie, 1999). From the drawings and written narrations I purposely chose six learners to interview from each school who were willing to tell their stories.

The educators were identified through a snowballing process. Snowballing is a sampling process whereby the initial information-rich participant interviewed refers the researcher to another participant who also meets the criteria used to select the first participant and the referral process is systematically repeated until the data is saturated (Struwig, 2001; Fraenkel & Norman, 2006). In this study the initial educator identified in each of the two schools was purposely chosen because they were involved in helping the orphaned learners and the educators interviewed subsequently were identified through the snowballing process. The general characteristic of the educators was that they had experience with the orphaned learners. The advantage of a snowballing sampling is that the researcher is able to reach participants who are inaccessible or hard to find (Struwig, 2001). In this study it would have been difficult to identify educators who are involved with orphaned learners without the recommendations of the other educators (Fraenkel & Norman, 2006). A limitation of the snowballing is that the sample may not be representative; however, for the purpose of this study, participants with rich information were the primary focus.

2.4.2.1 Selection of learners at school A

When I visited School A, I briefed the management team on what my research was about, how I intended to collect my data and the learners that needed to be involved. The reason for giving the criteria of the learners to be interviewed to the educators was to facilitate purposeful selection. The deputy principal instructed the class educators to supply the names of the orphans in their classes. The learners were identified through a feeding

project organised by Roman Catholic Church. The feeding project was a source of convenience and purposeful sampling. Convenience sampling involves choosing participants based on their availability and accessibility (Struwig, 2001). The senior educator then called all the orphaned learners and their educators to the staff room and introduced me to them. After the introduction I told them briefly about my study and asked the orphans to inform their guardians about it and ask for consent⁶ to participate in the study.

In the following week seventeen learners who volunteered to participate in the study attended the second meeting (Appendix E). The group consisted of eight boys and nine girls. The session lasted 45 minutes. I attempted to establish rapport with the learners before the interviews by holding a draw-and-write session with them (Appendix F). Establishing rapport with the learners before the interview sessions was necessary to ease any anxiety or nervousness that they might have been experiencing during the interaction process (Coyne, 1998). I was aware that establishing rapport with the learners contributes to trustworthy data (Patton, 2002).

The establishment of an interactive relationship was crucial because the vulnerability of the learners was twofold: they were under the age of 18 and, more importantly, because they were orphans. In the sessions I talked generally about myself, told the learners and the educators about my family, my research, how I became interested in the topic and the purpose of the study. I encouraged the learners to ask me questions. I wanted to reassure the learners that their responses would be confidential and encourage them to give careful and truthful answers (Dockrell et al., 2000). I assured the learners that their contribution might give us a better idea of what it means to be an orphan and draw attention to their needs.

The strategy I used to strengthen rapport was through drawings to illustrate what I was studying, providing more detail than I had in the first meeting (Appendix F) to explain

⁶ The senior educator told the orphaned learners who were willing to participate in the study to get consent from their caregivers.

why I was doing this study, how the learners would be involved and the value of their contribution to this study. I used the drawings to provide a visual image of my narration and give an example of how the orphans could talk to me about themselves through drawing. Cook, Fritz and Mwonya (2003) affirm that children are able to use drawing as an emotional outlet for their feelings and thoughts. The authors give an example from their study of how an orphaned child drew a picture of a baby bird alone in a tree to project the child's loneliness. Likewise, Lewis and Lindsay (2000) point out that the drawing technique provides an alternative means to verbal communication through which the learners project their experiences. I gave the orphaned learners a piece of paper to write their names on that had a number assigned to it. I explained to these learners that I would use pseudonyms in my report to conceal their true identity and that I would only use their real names to identify them when I needed to contact them for the interviews. Then I gave each orphaned learner coloured paper and pencils and told them to tell me something about themselves by drawing pictures. While they were drawing I asked them to write about who is in their drawing and what they are doing. After 45 minutes I collected the drawings.

At this time I was not sure whether the learners would open up in a focus group interview, so I asked them to volunteer to tell me something about themselves. The learners were silent for a while. Eventually one learner, a girl aged 14, volunteered to talk about her experiences. I realised by their prolonged silence that they may have been uncomfortable talking in the presence of other learners. I decided then that it would be best to concentrate on individual interviews with selected learners. From the drawings and the written narrations I purposefully chose learners who revealed actual experiences and seemed to be more willing to talk about these. Table 2.1 lists the detail of the learners from School A whom I purposely chose to participate in this study after the draw and write group session.

Table 2.1: Background information of orphaned learners (school A)

(The drawings and narrations of these learners appear in Appendix H.)

| LEARNERS | BACKGROUND INFORMATION | REASONS FOR CHOOSING LEARNERS FOR THE INTERVIEWS |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tebogo | Tebogo is seventeen years old and in Grade 11. He lives with his brother and sister. His mother passed away in 2005 and his father abandoned him when he was nine months old. | In his short story he wrote that he hates his father and used to tell people that he does not have a father. He wrote, "...when I was 9 months my father left me and my mother left me last year and my father he has not come to bury my mother". He continued to write that there are many things he wants to talk about and that he is willing to tell his story to someone. Based on the narration of how Tebogo relates to his father, it seemed to me that Tebogo could be experiencing emotional pain at being orphaned as a result of his mothers' death and his father abandoning them. I decided to include Tebogo in my interviews because he suited the purpose of my study and I wanted to give him a chance to tell his story. |
| Tshepo | Tshepo is fifteen years old and in Grade 9. He lives with an elder brother and sister. His mother is dead and his father abandoned them before he was born. Tshepo wants to be a doctor. | Tshepo drew a picture of himself and his siblings then rubbed out the drawings of the siblings. I became curious as to why he had changed his mind. Another point of interest was the sentence "The day I won't forget is the day my mother died". He did not elaborate. He then wrote briefly about the affectionate relationship with his mother, then the pain of |

| LEARNERS | BACKGROUND INFORMATION | REASONS FOR CHOOSING LEARNERS FOR THE INTERVIEWS |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | not knowing his father, followed by bitterness of being abandoned by his father, and lastly of hope that one day he might get to meet his father. I found the written narration intriguing and wanted to explore the experiences of this orphaned learner further. |
| Lerato | Lerato is fourteen years old and in Grade 8. She lives with her grandmother, brother and sister. Her mother died in 2002 and her father abandoned them when she was young. | The following narration drew my attention: “I am a person who like other people. I don’t like people who hate me for nothing. I do not know my father and that does not make me happy”. The expression of pain at the death of her mother and disappearance of her father captured my interest. I chose her for the interview because I wanted to explore the caring and love-hate relationship she is experiencing as an orphaned learner. |
| Lindiwe | Lindiwe is fourteen years old in Grade 8. Her mother passed away when she was one month old and her father passed away when she was one year old. She is staying with her grandmother and in the future she wants to be a pilot. | Lindiwe drew a picture of two girls, one wearing a flowered colourful dress and smiling and the other girl wearing a dress with a design of a red ribbon. She wrote about her parents briefly, and then she wrote about how she felt about people with HIV/AIDS. There is an indication of anger directed towards some people, a message of stigmatisation and issues of self-esteem. For example she wrote, “I am a person who like people and care about each other and like other...I do not hate people who have HIV/AIDS”. I had a feeling from the narration that the learner had a |

| LEARNERS | BACKGROUND INFORMATION | REASONS FOR CHOOSING LEARNERS FOR THE INTERVIEWS |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | rich story to tell about her experiences. |
| Thandi | Thandi is fourteen years old and in Grade 8. Both her mother and father had passed away. She is living with an uncle and aunt. She dreams of one day being a bank manager | Thandi wrote, “I like to play because when I am playing I do not think of my parents”. It seems from this statement that Thandi may be trying to block out some of her emotions. I chose Thandi for the interview because I wanted to further explore if my assumption was right. |
| Mpumi | Mpumi is fourteen years old and in Grade 8. Both her parents are dead and she stays with her sister. | Mpumi drew herself as a nurse standing next to a hospital building. She writes that she wants to be a nurse and at present she is not happy because they do not have food, so she goes to school hungry. I had a feeling that this learner had a lot to tell me about her situation, what she is experiencing and her choice of career, thus I decided to select her for an individual interview. |

2.4.2.2 Selection of learners at school B

When I visited School B, I first met the principal and briefed her on the purpose of my study and how I intended to involve the learners and the educators in the study. The principal gave me the background of the school and then I was introduced to the Head of Department (HOD) Senior Phase, who was also in charge of the orphaned learners. She then introduced me to the other educators. I told the educators about my research and asked them if they would be willing to be interviewed. It was my observation that most of the educators were reluctant to be part of the study. Some of the educators advised me to interview the HOD because she was the educator responsible for caring for the orphans. I assured the educators that since they also interacted with the orphans I would like to hear

their views and experiences. I told them my plan was to first interview the learners, after which I would interview some of the educators.

When I visited School B the second time, the HOD introduced me to the orphans who had volunteered to be part of my study and had consent from their guardians. Sixteen learners were present in the first session. I again used drawings to tell the learners about myself, explain reasons for my research, how they would be involved and the value of their contribution to my research. Then I gave them coloured paper and pencils to draw and/or write something about themselves. After about fifteen minutes I realised that most of the learners were drawing houses. I asked the learners to draw themselves and the people in their lives, and then write a few sentences about what was happening in their lives. The purpose of the session was to give the learners the opportunity for non-verbal communication of their experiences from which I could identify the learners who would be willing to talk about them. I noticed that the learners were not sure of what was expected of them. I then requested that the HOD explain to the learners in their mother tongue what I asked them to do. I told them they could write their short stories in either Zulu or Ndebele. Most of the learners then wrote their stories in Ndebele and my research assistant translated the stories into English (Appendix J).

A week later I had another draw-and-write session with a group of nineteen learners. After the second draw-and-write session in School B, I chose the orphaned learners I wished to interview individually. Table 2.2 lists the participants from School B. Pseudonyms were used to conceal the identity of the learners.

Table 2.2: Background information of orphaned learners (school B)

(The drawings and narrations of these learners appear in Appendix I.)

| ORPHANED LEARNERS | BACKGROUND INFORMATION | REASONS FOR CHOOSING LEARNERS FOR THE INTERVIEWS |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Karabo | Karabo is sixteen years old. He lives with his two sisters and a brother. Both his parents have passed away. | Karabo drew a sports car and no other drawings. Then he wrote a short story about how he lived with his grandmother who drank alcohol and brought food late in the night. He did not like the living conditions because he did not have time to do homework. I chose to interview this learner because I wanted to explore the changes in his life since he had moved in with his grandmother. |
| Thato | Thato is eleven years old and in Grade 4. He is living with his sister and grandmother. Both his parents have passed away. His father died in 2004 and his mother in 2005 | Thato drew himself, his sister and grandmother and wrote a short note that when the mother was still alive he did not stay with her. This comment captured my interest. I wanted to find out why he was living with his granny when the mother was still alive and what had changed since his mother passed away |
| Nomsa | Nomsa is twelve years old. She is in Grade 6 and lives with her aunt, uncle and brother. Her mother died in 2000 and her father in 2001. | The following narration drew my attention: "I feel happy at school because I have friends who love me and care for me. I feel like a educator is like a mother for me or father because they make me feel happy and more good at what I am doing". I wanted to explore her relationships at school and the emotions attached to these relationships. |
| Lesego | Lesego is twelve years old and in Grade 6. Her mother has passed away. She is staying with her father and her brother. | Lesego draws a picture of herself, her brother and her educator. She then wrote, "I am not happy because my father do not want to buy for me school shoes and my |

| ORPHANED LEARNERS | BACKGROUND INFORMATION | REASONS FOR CHOOSING LEARNERS FOR THE INTERVIEWS |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | granny, she does not want me to play and she treat me like a dog”. I wanted to explore her experiences further by interviewing her. |
| Lebo | Lebo is ten years old and in Grade 4. He is staying with his mother, grandmother, brother and sister. His father has passed way. | Lebo drew a picture of himself standing at a distance from his brother and sister. He wrote that his brother beats him and his sister is selfish. I choose Lebo because I wanted to explore the experiences of sibling relationships. |
| Zodwa | Zodwa is ten years old and in Grade 5. Her mother passed away in February 2006. She lives with her grandmother, sister and an aunt. Her father is a truck driver living somewhere else and visits them once a month. | Zodwa seemed to be shivering although she was wearing warm clothes. She has rashes on her face, hands and legs. She looked much smaller than the other children in her grade. Her appearance drew my attention and I decided to hear her story. |

Appendix J is an example of a drawing and accompanying memo for a learner not included in the interview.

2.4.2.3 Selection of educators in School A

In School A, the deputy principal introduced me to Educator Mabena (pseudonym), one of the educators involved with the orphaned learners, and I made an appointment to interview her. Educator Mabena was purposefully selected because she had rich information about her experiences with the orphaned learners (Patton, 2002). After interviewing Educator Mabena I requested her to recommend another educator that I could interview. I then identified other educators to be interviewed through a snowballing process. Educator Mabena recommended that I interview Educator Selepe, who referred me to Educator Khumalo, who then recommended that I interview Educator Chabalala.

Table 2.3 provides the background information on the educators at school A and my reason for having chosen them. Pseudonyms are used to protect the identity of these educators.

Table 2.3: Background information of educators interviewed (School A)

| EDUCATOR | BACKGROUND INFORMATION | REASONS FOR CHOOSING THE EDUCATOR |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Mabena | Ms Mabena had been teaching in school A since February 2000. The subjects she teaches include Maths, Physics and Biology (Grade 8 to Grade 12). | Ms Mabena is one of four educators the deputy principal of this school recommended that I interview. She was teaching learners across four grades and was in a position to know some of the orphaned learners. She is also on the Uniform Committee that ensures the learners are dressed in the official school uniform. |
| Selepe | Ms Selepe started teaching at school A in 2001. The subjects she teaches include Business Accounting and Economics (Grades 10–12 and EMS Grades 9–10.) | After interviewing Ms Mabena I asked her about other educators on the Uniform Committee I could interview and she directed me to Ms Selepe. Ms Selepe is teaching three full classes of 75–80 learners per class. She is also a class educator for Grade 10. She is in a position to know and interact with some of the orphaned learners. She told me that after identifying the orphans she refers them to Ms Khumalo for assistance. |
| Khumalo | Ms Khumalo started teaching at school A in 2005. Her subjects include Sepedi and Business Economics (Sepedi to Grades 8–10 and Business Economics to Grade 11 and 12).s | She is a key informant and one of the educators that the deputy principal and Ms Selepe recommended that I should interview because of her involvement with the orphans. While interviewing Ms Khumalo, she told me that Ms Chabalala is the educator who initiated the lunch programme for children who do not bring lunch to school. |

| EDUCATOR | BACKGROUND INFORMATION | REASONS FOR CHOOSING THE EDUCATOR |
|------------------|-----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Chabalala | Ms Chabalala has been teaching at School A since 2003. She teaches Science to Grades 8, 11 and 12). | She sourced donations from her church and initiated a lunch programme for orphans and other needy children who do not bring lunch to school. I chose to interview her to explore her experiences with the orphaned learners. |

2.4.2.4 Selection of educators in school B

In School B the principal had suggested that I first interview Educator Mtlala, the HOD, who is also responsible for orphaned learners. When I interviewed Educator Mtlala I asked her questions based on her experiences with the orphans and emerging questions that arose from the interviews with the educators in School A. After interviewing her, she recommended that I interview Educator Malope and Educator Mokoena. Educator Mokoena referred me to Educator Dube (Appendix E).

Table 2.4 gives the background of the educators at School B that I interviewed.

Table 2.4: Background information of educators interviewed (School B)

| EDUCATOR | BACKGROUND INFORMATION | REASONS FOR CHOOSING THE EDUCATOR |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Mtlala | Ms Mtlala is an HOD (Senior Phase). | Educator Mtlala is in charge of learners' discipline in the school. She is involved with the orphans referred to her by other educators. I chose to interview her to explore her experiences with the orphans. |
| Malope | She has been teaching in the school for twenty years. Her subjects include Social Science, Isizulu and Life Orientation, which she teaches to Grades 4, 5 and 6. | Ms Mtlala referred me to two educators who have been attending seminars on inclusive education, namely Ms Malope and Ms Mokoena. |

| EDUCATOR | BACKGROUND INFORMATION | REASONS FOR CHOOSING THE EDUCATOR |
|-----------------|-------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|
| Mokoena | She is a Foundation Phase educator. She has been teaching Grade 2 for the last five years | Apart from being referred to her by the HOD, I wanted to explore her experiences with younger learners. |
| Dube | She is the HOD (Foundation Phase). She has eight years experience at the school. | I contacted Ms Dube through the snowballing process. I wanted to explore her experiences of teaching younger children. |

2.4.3 Data collection methods

In this research study I explored knowledge about the reality of the needs of orphaned learners using interactive qualitative methods that enabled me to explore the learners' perspectives. I used the *draw-and-write* technique as a method of facilitating interaction with the learners (Driessnack, 2006) and face-to-face semi-structured interviews to collect data.

Face-to-face semi-structured interviews started with a set of open-ended questions to guide the interview followed by probing questions for depth and clarity (Morse & Field, 1995). Face-to-face semi-structured interviews were used to collect data in this research study (Appendix L) because they had the potential to give the participants the opportunity to describe personal information in detail and allow me to explore the meaning the participants attach to their lived experiences (Marshall & Rossman, 1999). I obtained rich data by asking specific *what*, *how*, and *why* leading questions and had follow-up questions and probes with the aim of eliciting relevant details and in-depth information that described and explained the participants' perspective of the phenomenon (Seidman, 1991; Marshall, 1999; Trochim, 2001; Creswell 2002; Rubin & Rubin 2005). In semi-structured interviews, most participants are able to reveal their intentions, beliefs, values and reasons and how they made sense of their experiences (Henning, Van Rensburg & Smit 2004). Another advantage of face-to-face semi-structured interviews is that they produced data that I could compare to obtain common factors in the experiences of the learners and the educators.

A possible limitation of face-to-face semi-structured interviews is that the participants may strive to provide the answer they presume the researcher wants to hear (Dockrell et al., 2000). To reduce the effect of this limitation, I established a trusting relationship with the learners by building rapport during the *draw-and-write* session before the interviews. I chose to hold the drawing session before the interview because research findings indicate that children tend to speak more freely when given the opportunity to draw first before conversation (Driessnack, 2006). The relationship thus established was a way of gaining confidence and trust so that the learners could tell me the truth.

The nature of data collection was also more in the form of narration of the learners' and educators' experiences, with follow-up questions for clarity and depth, rather than a question-answer interview format. I also reassured the learners that there were no right or wrong answers and that a "*I do not know*" answer was allowed to avoid guess work (Dockrell et al., 2000). Another limitation identified by Morse and Field (1995) is that the presence of the researcher might make the participants unwilling and uncomfortable to share their experiences. In this study the limitation that emerged during the interview with the learners was that one learner was either shy or felt uncomfortable talking about her needs and experiences. I requested her to write another story of her experiences for me (Appendix M).

2.4.3.1 Interviews with learners

After selecting twelve learners who participated in the draw and write session, I requested the deputy principal and the senior educator in School A and the HOD in School B to assist me in contacting them. Since the paradigm for this study accepts that there are multiple realities, I interviewed different orphaned learners to get different views of the phenomenon, which increased the credibility of the study and provided balance in the perspectives and depth (Rubin & Rubin, 2005). The selected learners were boys and girls aged between 10 and 17. The purpose of interviewing learners was to establish what their emerging needs were by listening to their stories. A further motivation for interviewing

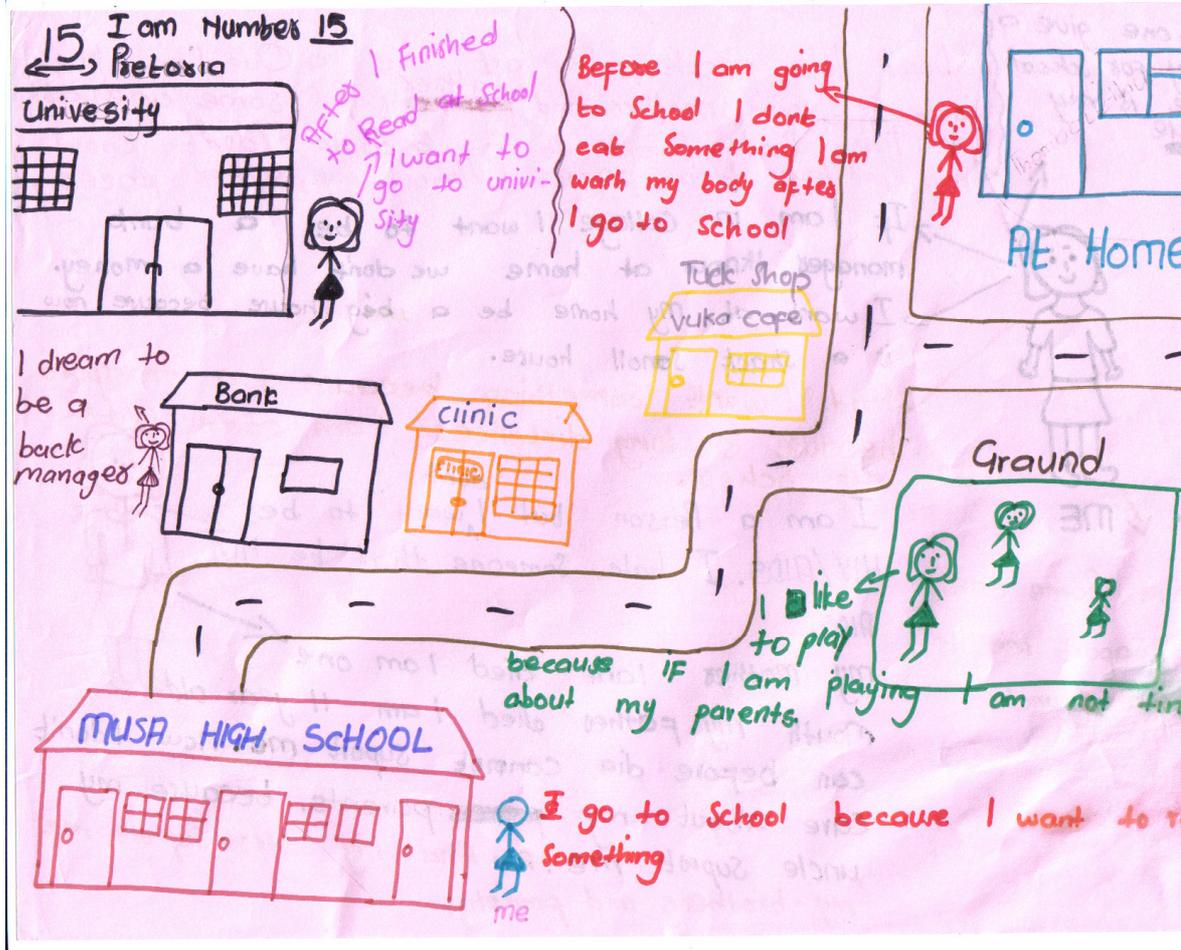
the orphaned learners, as noted earlier, was that young people see the world differently from adults. As such, adults cannot accurately represent children's perspectives (Fielding & Prieto, 2002). Fielding and Prieto further emphasise that verbal interaction with children enables them to reflect on their own understanding of reality and provides an opportunity to express what they think, experience and expect. Eder and Fingerson (2002) affirm that:

One of the reasons for interviewing youthful respondents is to allow them to give their own interpretation and thoughts rather than rely solely on our adult interpretation of their lives..

The notion of giving children a voice is in line with the interpretivist/constructivist paradigm, in which it is accepted that knowledge is created in the mind, and is concerned with capturing participant's point of view through interaction. Since this study was placed within the interpretivist/constructivist paradigm, my goal was to elicit different perspectives of the orphaned learners and the educators. To achieve this goal I established a friendly relationship that encouraged learners and educators to talk about their lived experiences. The interviews with the learners were conducted at school after teaching hours.

The interviews with the learners lasted about 45minutes. The interview sessions were conducted in the learner's classrooms at the end of the school day. During the interviews I asked the orphans to tell me more about their drawings and their written text. As the orphaned learners narrated their experiences, I asked them questions for further clarity and depth. I engaged an assistant to break the cultural and language barrier and to act as a translator when conducting the interviews. These strategies were less threatening than asking the orphans direct questions. I took into consideration that children might find it difficult to express their views verbally when the issue being discussed was sensitive but they could express their feelings through other forms such as drawing and written text (Cook et al., 2003). The interviews were audio taped for accuracy and the recording transcribed verbatim. The following drawings are two examples of how I incorporated these into my interviews with the orphans.

Drawing example one



Learner: Thandi

8-2-2006

Researcher: 'I like your pictures very, very much. You draw better than me. Please tell me what is happening in this drawing?'

Thandi: 'These are the things that I like (drawing of three girls).'

Researcher: 'What are they doing?'

Thandi: 'I like playing.'

Researcher (While pointing to the smaller drawing of a girl): 'Who is the small one?'

Thandi: ‘My friend.’

Researcher: ‘Here you wrote that *I like to play because when I am playing I do not think of my parents*. Do you think of your parents all the time?’

Thandi: ‘I think about them sometime. When I think about them I feel bad.’

Researcher: ‘When did they leave you?’

Thandi: ‘When I was very small. I do not know them.’

Researcher: ‘From the drawing I can see that you want to be a bank manager. Why do you want to be a bank manager?’

Thandi: ‘I want to do something that I want at home. We have a small house. It is a shack we do not have a beautiful house. I want to be a bank manager so that I build a beautiful house.’

Researcher: ‘Whom do you stay with?’

Thandi: ‘My uncle and my sisters and brother.’

Researcher: ‘Who is this in the drawing?’

Thandi: ‘Me.’

Researcher: ‘What are you doing?’

Thandi: ‘I am talking.’

Researcher: ‘What are you saying?’

Thandi: ‘I do not like people asking me about my parents.’

Researcher: ‘Please tell me more.’

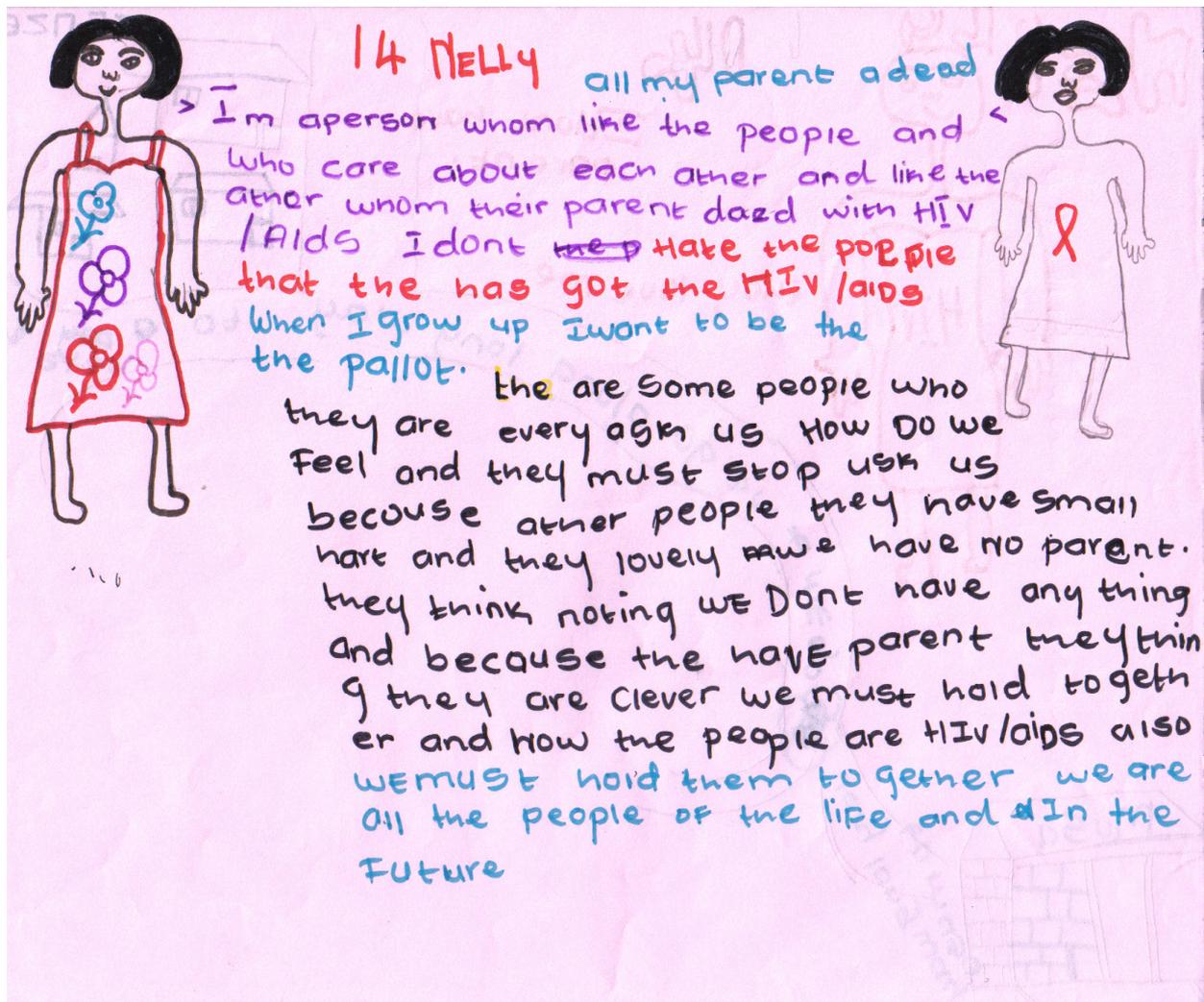
Thandi: ‘When somebody ask me about my parents I feel bad.’

Drawing example two

Individual Interviews- School A

Learner: Lindiwe

8-2-2006



Researcher: 'What is happening on this page?'

Lindiwe: 'This page, I am a person who cares about people with HIV. I do not like people who when you tell them I am HIV they laugh at you like you are a fool and other people they are not a fool. They did not make her feel sad.'

Researcher: 'So you do not like the way they are treating your friend?'

Lindiwe: 'Yes, I do not like it.'

Researcher: 'Who is this with a ribbon on the dress?'

Lindiwe: 'My friend'

Researcher: ‘Who is this wearing a flowered dress?’

Lindiwe: ‘It is I.’

Researcher: ‘Why does your friend look sad?’

Lindiwe: ‘She is not happy because other people they laugh at her. When she comes they run away.’

Researcher: ‘Do you want to tell me something about your parents?’

Lindiwe: ‘I do not know my parents. My mother died when I was one month or one year. I do not know them.’

Researcher: ‘They died?’

Lindiwe: ‘Yes.’

Researcher: ‘Both of them?’

Lindiwe: ‘Yes.’

Researcher: ‘Whom are you staying with now?’

Lindiwe: ‘I am staying with my grandmother.’

Researcher: ‘You wrote here that when you grow up you want to be a pilot, why do you want to be a pilot?’

Lindiwe: ‘I want to go to many places because now when the school has a trip I do not have money. I do not know it. That is why I want to be a pilot because I cannot afford to go for school trips. Maybe if I am a pilot I will afford that.’

Researcher: ‘What else are you not having now that you would wish to have?’

Lindiwe: ‘I wish to help other orphans.’

Researcher: ‘You wrote on this page that you are a person who likes people and care for other people who their parents died of HIV. Tell me more about it.’

Lindiwe: ‘There are some children who parents died of HIV. In town I see but they are not many. I wish that I could know others so that I could help them. Another parent was shot. Another friend her brother goes to initiation when he came back they shout at him and he took poison.’

Researcher: ‘Can you explain to me what you wrote here? You said you do not like people asking you things why?’

Lindiwe: ‘Sometimes they ask me how do you feel. Many, many times they ask, *How do you feel?* After that they go to a corner and laugh.’

2.4.3.2 Interview with the educators

In the initial interview with educators in School A, I asked Ms Mabena to tell me about herself, then her experiences with the orphans. My questions were open-ended and focused on the perception of orphans' needs. The questions asked in this interview were generated from the gap I had identified in the literature and questions that puzzled and motivated me to do the study (Appendix L). The duration of the interview with Educator Mabena was 45 to 60 minutes. After the interview I transcribed the audiotape and coded the data, then revised the questions I would ask in the following interview based on the themes that were emerging from the interview already dealt with (Appendix O).

Educator Mabena referred me to Educator Selepe. The two other educators in School A were also identified through a referral process. Each time I was referred to an educator, I called them to ask for their consent and made arrangements to interview them at a time and place to their convenience. Some of the educators were interviewed at school while others were interviewed in their homes (Appendix E). Whenever I interviewed an educator, I would immediately transcribe and code the interview and revise the interview questions based on the emerging themes (Appendix M).

In School B the principal suggested that I interview Educator Mtalala, the HOD responsible for orphaned learners. When I interviewed Educator Mtalala I asked her questions based on her experiences with the orphaned learners and verified themes that emerged from the interviews with educators in School A. The educators interviewed in the follow-up interviews, Malope, Mokoena and Dube, were identified through a snowballing process. The data collected were descriptive and presented a personal view of the educators' experiences. A tape recorder was used (with permission from the participants) to increase the accuracy of data recording, while notes were also taken on aspects of the interview that could not be recorded on tape.

2.4.3.3 Observation

The third data collection method was observation in the context of interaction between the researcher and the participants. Angrosino and Mays de Perez (2000) point out that the interaction between the researcher and the participant changes the behaviour of the participant. Observation as context of interaction is a strategy in which the researcher incorporates gestures and body language that add meaning to verbal communication in verified data collected in the interviews (Angrosino & Mays de Perez, 2000). Direct observation of non-verbal communication during the interaction between the researcher and the participant enables the researcher to understand the holistic perspective of the phenomenon under study (Patton, 2002).

My observation was done during the briefing session that I had with the educators and the orphaned learners, during the draw-and-write session with the learners and the interviews with the orphans and the educators. During the interview observation may be in form of taking note of body language, gestures, facial expression and pauses that could add significant meaning to the verbal expression (Angrosino & Mays de Perez, 2000). When interviewing the orphans and the educators I took note of voice tone as they narrated their story and answered my questions (see Appendix P). The observation was a multiple, ongoing process over the period of the interviews.

During the observation I played the role of an inside observer (emic) as opposed to an outside observer (etic). The role of an insider observer demands that the researcher be part of the group of people or phenomena being studied. In my study, I interacted with the participants during the interviews and concentrated on observing their behaviour as they responded to my questions (Appendix P). My presence initially created a halo effect and anxiety over the behaviour of the orphaned learners and the educators (Patton, 2002). To overcome the unnatural behaviour of the participants during interviews, I reassured the educators that the purpose of the study was not to evaluate or judge their behaviour towards the learners but to gather information on their daily life experiences that would provide insight and understanding of how educators identify and respond to the needs of

the orphaned learners. The more I visited the schools the more relaxed the learners and educators became and they gradually started behaving naturally. Another disadvantage of observation is that the researcher may be biased in reporting what is said during observation. This limitation was addressed by being objective in taking field notes during the session (Angrosino & Mays de Perez, 2000)

2.5 DATA ANALYSIS

The process of data analysis involved scrutinising the data to identify key factors or themes and to establish how these themes are related, as well as to construct an explanation of how orphaned learners perceive their needs and how educators identify and respond to the needs of orphaned learners. In this study, I applied constructivist principles to identify themes from the emerging data and how they are related to generate a substantive theory on how educators manage the needs of orphaned learners. My unit of analysis was the experiences of the orphaned learners and their educators. My research focused on how the educators identified the emerging needs of orphaned learners and how they supported or assisted the learners and why the educators responded the way they did. I compared what an individual educator told me they did to assist the learners and the common practice among the educators from the two schools. The process of analysis was done in two distinct interactive phases namely, open and selective coding (Glaser, 1978; Charmaz, 2000).

learners with rich stories. I further analysed their drawings and wrote reflective notes in my journal, as well as the questions that I had asked them in the individual interview (see Appendix B). My first set of interviews at School A was with three girls and two boys and at School B with two boys and two girls. Afterwards I listened to the taped interviews and transcribed the recorded interview sessions. The transcribing of oral recording into written text was done word for word because I needed detailed descriptions for an in-depth analysis of the data (Morse & Field, 1995; Strauss & Corbin 1998), as opposed to transcribing pre-selected parts, which might have resulted in omitting important details (Seidman, 1991) During the following two weeks I interviewed three learners, two girls and a boy from School A and three girls and one boy at School B and then transcribed the recordings.

After transcribing the second set of interviews from School A, I started open coding after reading through the transcript several times. In open coding, I established what was occurring by doing microscopic analysis. I coded the transcript by analysing the text word by word, phrase by phrase and sentence by sentence. I wrote a code after every sentence and in between the sentences. The first set of codes was descriptive codes from the text, which included *in vivo* codes (terms used by the participants in the field) to preserve the voice of the participant (Strauss & Corbin, 1998). When assigning a code to text I determined the contextual meaning of the transcribed words, phrases and sentences (see Appendix M). After coding I read through the coded transcript to identify the concepts that share common characteristics or meaning, and then I clustered the concepts into categories by highlighting sections of the transcripts in different colours (Strauss & Corbin, 1998; Glaser & Strauss, 1999). After colour coding the transcript I cut out the codes that were related and pasted them onto sheets of paper, then I identified the common characteristics and named the categories.

I further explored the properties⁷ and dimensions⁸ of each category. As Strauss and Corbin explain, properties and dimensions verify and refine the concepts within

⁷ Properties are characteristics of the category (Strauss & Corbin, 1998).

⁸ Dimensions are variations of the properties (Strauss & Corbin, 1998).

categories, thus increasing knowledge of the categories (Strauss & Corbin, 1998). In this study my supervisor assisted me in checking the clarity and consistency of the categories that I had identified by coding the data. I took note of the contradictions and inconsistencies and recorded my concerns as memos. Writing memos in the open coding process served as a reminder of the type of questions to ask in subsequent interviews based on the gaps identified in the emerging categories (Strauss, 1987). I also recorded the hunches, interpretations and ideas that emerged while analysing the data (see Appendix V reminder memo). In later memos, I clarified the categories and noted the differences between categories (Morse & Field, 1995). I later used the information recorded in these memos for writing up my report.

I made multiple visits to the two schools to collect data, to discover answers to questions that arose from the data analysis and to saturate the identified categories. Glaser and Strauss (1999:62) describe saturation, as “a stage in the data collection process when conducting further interviews does not produce new data”. In this study the emerging new categories were compared with the already existing categories, a process termed constant comparative analysis.⁹

In analysing the data I engaged in both deductive and inductive reasoning. Deductive reasoning was applied in analysing the emerging codes to determine subsequent data to be collected and the participants to be involved in the data collection; while inductive reasoning was applied during the constant comparison process that led to theory generation (Glaser, 1978). Full diversity and details of the experiences of the orphaned learners and the educators and patterns in the data were achieved through a process of constant comparative analysis. Patterns in the data emerged through constant comparison of similarities and differences in the data (Tesch, 1990; Merriam, 1998).

During the constant comparison analysis I refined the identified categories by replacing the initial descriptive codes with conceptual code names to make the categories abstract. I

⁹ Glaser and Strauss (1999) describe constant comparative analysis as a process whereby the researcher moves back and forth from data collection to data analysis, comparing similarities and differences in the new categories and the already identified categories in terms of their properties and dimensions

wrote theoretical memos that clarified the meaning of the new categories (Morse & Field, 1995; Strauss & Corbin, 1998). I created three files for the categories:

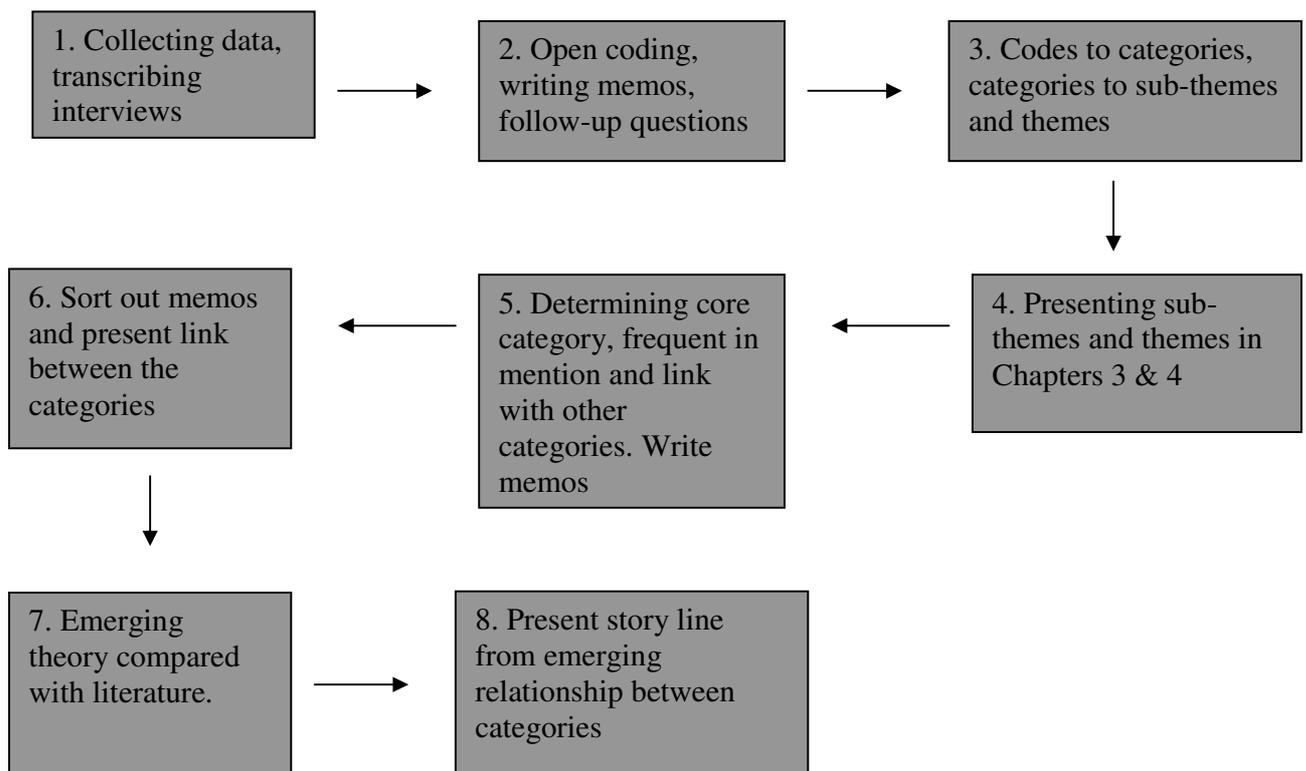
- The first file contained the categories that related to learners' needs.
- The second file consisted of categories on how educators identified the needs of orphaned learner.
- The third file was on how educators responded to the needs of the orphaned learners.

I continued to analyse the emerging categories, comparing them with the categories that had been defined to establish the relationship between and within the categories, to provide a complete explanation of what was occurring (Strauss & Corbin, 1998). In analysing the categories I looked for what the educators said and did with regard to managing the needs of orphaned learners, based on the circumstances in which they are working. I compared the experiences of the educators with those of the orphaned learners and ranked the needs of the orphans according to how they appeared to the educators, taking note of the needs that were attended to and those that were not. I then examined the coded data again to check why the educators considered some needs more important than others. I also compared how different educators responded to similar needs and the action they take in attending to those needs. In cases where there were similarities in the way the educators identified and responded to the learners needs, I explored the properties and the dimensions of the categories (see Appendix Q). In other cases where the experiences were different, I conducted follow-up interviews to find out the circumstances that made the experiences different, factors that influenced the decision taken, the action implemented and the consequences of the action taken. I summarised the contents of the categories and established the main categories and presented my findings as categories, themes and sub-themes, as recorded in Chapters 3 and 4.

In the second phase of the analysis I read through the transcribed interviews again, noting the frequency with which the emerging categories were mentioned to determine the core category sub-themes identified and the category. Strauss describes the core category as

the category that other categories relate to and one that has the most variation in the pattern of behaviour. It is the category with most properties and dimensions and therefore takes a long time to saturate. After identifying the category with the highest frequency of mention, I read through the transcripts to find how the other emerging categories relate to the core category. I then wrote memos on the link between the categories and the core category and re-sorted the memos to establish a story line on how the educators respond to the needs of orphaned learners. I presented my analysis in the form of a narrative, by arranging the categories in the themes to produce a story line that led towards building a theoretical conclusion. I reviewed literature after the theory was generated to establish how my theory fitted into, or extended, the already existing theories.

Figure 2.3: Summary of the process



The advantage of grounded research theory is that the theory generated is relevant and applicable to the context of the phenomenon. However, the process of generating the

theory presents several challenges to the researcher. One of the challenges in grounded theory is analysing the data. Henwood and Pigeon (1992) point out that approaching research without a theory creates a problem in making sense of the collected data. In this study my approach to making sense of the data was to systematically code the text, which was done line by line to identify the emerging categories. I then compared similarities and differences within and between the categories to refine the identified categories and to establish the meaning of the data. Another challenge in generating grounded theory is that the process requires the researcher to collect extensive data in order to do constant comparative analysis. Collecting extensive data to saturate the categories is a time-consuming process. It is also not easy to determine when the categories are saturated (Creswell, 2002) and if the categories are not saturated there is a risk of producing theory that lacks conceptual depth. I did follow-up interviews till there was no new information in the data collected.

In addition to the challenges mentioned, there are researchers who have criticised the process of generating grounded theory, claiming that the presentation of codes and categories in the theory-building process fails to present the participants' holistic experience of the phenomenon (Denzin & Lincoln, 2003). In this study, I included excerpts from the interviews with orphaned learners, the learners' pictures and the educators' narrations. The excerpts provide rich narratives that could enable the readers to enter into the world of participant realities and share insights of their lived experiences. Another criticism is that grounded theory views the participant as an expert, who uses a set of objective procedures to analyse the data to generate theory (Denzin & Lincoln, 2003). The process of theory generation in this study was guided by constructivist epistemology. Working from a constructivist epistemological stance the process of generating theory was a joint effort between each participant and the researcher. The participants provided the data from which the theory would be generated. My role was to facilitate the process by asking questions that would elicit an explanation of life experiences from the participants. In the coding process I used *in vivo* codes (codes generated from actual wording used by the participants) and my own codes in the initial coding phase. The initial descriptive codes were further analysed and renamed as

conceptual codes that made up the categories used in theory building. I also checked the credibility of my analysis and interpretation with the participants. In this study, theory was generated through a joint interactive process of constructing and negotiating reality between the participants and me.

2.6 QUALITY OF THE STUDY

The issue of credibility and trustworthiness was addressed by crystallising data from the interviews, drawings and my observations. I collected interview data from four educators and six learners from each of the two schools and checked the consistency of the data collected from the educators and the learners and the data collected among the learners and among the educators. I verified my interpretation of the learners' drawings by asking the learners to explain what was happening in them.

2.6.1 Credibility and trustworthiness

Trochim (2001) describes credibility as a process of establishing whether the results of a research effort are believable or true from the perspective of the participants. One of the strategies of enhancing credibility is member checking.¹⁰ Member checking can be done by giving the participant transcripts and drafts of findings to get their reaction, which could be their agreement or disagreement of how the researcher portrayed them (Seale, 2000; Patton, 2002). In this study, during the data analysis I gave the participants the interview transcripts and the emerging themes to verify my accuracy and interpretation. The participants in this study recognised the experiences that I had described and confirmed them as their own through the process of member checking¹¹ (Appendix S). The advantage of member checking is that participants are given the opportunity to verify whether the researcher has represented their perspectives and interpretation of meaning

¹⁰ Member checking is the process whereby the researcher involves the participants or key informers in the study to check for accuracy of research findings and data analysis in order to rule out the possibility of misinterpretation and to identify researcher bias (Strauss & Corbin, 1998; Radnor, 2001; Maxwell, 2005).

¹¹

correctly (Patton, 2002). The participants are able to reflect on their views and alert the researcher to withdraw the opinions that the researcher should not publish (Patton, 2002). The disadvantage of member checking is that it is time consuming although it does enhance the credibility of the study.

Peer review is also a way of contributing to the credibility of a study. Criticism from peers builds up credibility of the study especially when the possibility of researcher bias is detected (Seale, 2000). In this study, I kept a record of raw data, my theoretical notes and interpretation, which I gave to my supervisor to study in-depth so as to point out biases, flaws and other problems in the study (Babbie & Mouton, 2001). I have also presented detailed description of how data was collected and an explanation of the procedures used in data analysis to give a vivid picture of what was going on (Radnor, 2001). I chose orphaned learners and their educators because they were people with first-hand information on the needs of the orphaned learners. I interviewed a total of twelve orphaned learners and eight educators from the two schools. The different learners and educators provided diverse perspectives of the phenomenon presented.

To limit the possibility of bias in my analysis and enhancing credibility, when analysing the data I identified categories that related to the main category and further explored the explanation of these categories. I also looked for alternative explanations to the emerging categories (Seale, 2000; Patton, 2002) by including questions in the follow-up interviews that could confirm or disconfirm the rival explanation of research findings. Follow-up interviews were also used to verify, affirm, elaborate and modify the information collected and observation field notes to corroborate and verify interview data from educators and learners. To ensure rigor in the analysis I explored the significance of the negative cases and explained why the categories do not relate to the core category (Patton, 2002). I also checked and reported the discrepancy evidence from the data collected and searched for alternative explanations. Failure to find evidence that supports the alternative explanation meant the core category identified best fitted the phenomenon (Patton, 2002).

The multiple data collection methods were used to reduce the errors of using one method (Patton, 2002). The precaution I took to reduce my bias in recoding data was to use audiotape to record the interview. The reactivity threat was limited by a prolonged period of data collection, in which I conducted multiple interviews to compare the perspectives of the learners and the educators and to saturate the emerging themes. During data analysis, I used *in vivo* codes to bring out the voice of the participants (Strauss & Corbin, 1998). I verified the meaning of the code name with the participants in follow-up interviews and confirmed accuracy of my interpretation through the process of member checking.

Trustworthiness is the extent to which the findings of the researcher can be trusted (Patton, 2002). Keeping a record and having an audit trail of the research process are ways in which a researcher can enhance the trustworthiness of the research findings (Patton, 2002). In this study the appendices provides a trail of evidence of the research process and the decisions taken.

2.6.2 Transferability

Trochim (2001) defines transferability as the degree to which the results of a research can be generalised or transferred to another context or setting. In qualitative research the transferability of findings is determined by the reader, based on the comparisons of the context of the study with that of their own knowledge (Mertens & McLaughlin, 2004). Transferability of the findings of the study is made possible by the researcher providing a rich description of the context of the study (Seale, 2000). In this study I provided an in-depth description of the physical and social setting of the two schools and the community that these schools served through my observations and the background information about the schools provided by the educators. I also included excerpts of interviews, drawings and narrated stories from the participants. The purpose of providing detailed information on the context of the study is to enable the readers to decide whether the findings of the study relate to their own school situation. The study represented the theoretical perspectives of the learners and educators from two schools at a specific moment in time;

therefore the internal generalisability within the group was studied. In addition the findings of this study could provide insights that could lead to a better understanding of the experiences of the learners and the educators, with possible explanations of how and why the educators respond to the orphaned learners in certain ways.

2.6.3 Dependability

Veale (2000) defines dependability as how one can determine whether the findings of a study can be repeated with the same participants under the same circumstances. To determine dependability one has to provide an audit trail in terms of providing documentation of data, methods, decision made during the research process and verbatim accounts of the participants' perspectives (Trochim, 2001). In this study verbatim interview transcripts and in vivo codes were used during the analysis (Appendix R). Verbatim accounts of the participants' responses limit selective effects of the perception and expose the raw data to the readers (Seale, 2000). To ensure the appropriateness of the inquiry process, I kept memos and reflective notes on the decisions I took and the rationale for the decisions at every stage of the research process. I kept a reflective journal (Appendix B) to record my reflections and assumptions on the general research process. Detailed records of how I chose my participants, the themes that I based my follow up interviews on (Appendix O), how I analysed the data, verified findings and drew my conclusions were included in the memos. My reflective journal and the memos provided an audit trail that my supervisor and other researchers could refer to when checking the dependability of the study. Reflective journals and memos were also useful to me in checking on my own bias.

2.6.4 Confirmability

Confirmability is the degree to which the results of the study could be confirmed or corroborated by participants (Seale, 2000; Trochim, 2001). To enhance confirmability, an audit trail that provides data collection and data analysis procedures enables the researcher to check and recheck the data throughout the study to identify potential bias,

distortion of research findings and alternative explanation (Marshall & Rossman, 1999; Trochim, 2001). In this study I have provided details on the selection of the participants, data collection and analysis to enhance the confirmability of the findings.

2.7 SUMMARY

In Chapter 2, I described the interpretivist/constructivist epistemology underpinning this research study. It was assumed for this study that the knowledge of the needs of orphaned learners and how educators experience and respond to the needs of the orphans could be established by exploring the lived experiences of the orphaned learners and their educators. Qualitative data collection and data analysis methods that enabled me to explore the multiple perspectives of the participants and co-construct knowledge about the phenomenon were discussed. A comprehensive description of grounded research theory analysis procedures was provided. Also highlighted were the strengths and weaknesses of grounded research theory and how I attended to the weaknesses identified and the strategies that I employed to ensure quality in the study.

In Chapter 3, I present the results of my interviews with the orphaned learners.