

**AN ECOSYSTEMIC SCHOOL GOVERNANCE MODEL FOR
COMBATING THE IMPACT OF THE HIV/AIDS PANDEMIC ON
LEARNERS AND EDUCATORS**

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ABSTRACT

AN ECOSYSTEMIC SCHOOL GOVERNANCE STRATEGY FOR COMBATING THE IMPACT OF THE HIV/AIDS PANDEMIC ON LEARNERS AND EDUCATORS

Both national and international research reveals that the HIV/aids pandemic has become the most common diagnosis among learners and educators globally. What is especially troublesome for education is that this pandemic does not befall the whole population equally, as young people between the ages of 15 and 24 (during their most productive years) are disproportionately affected.

South Africa has specifically, in the past decade, experienced an exponential growth in the prevalence of HIV infections while the effects of HIV/aids-related deaths are continuously being felt by families, communities and schools. Various statistical data allude to the fact that HIV/aids continues to present major challenges to schools, obstructing them from reaching the ultimate objective of the education system at large, as set out in the South African Schools Act, 84 of 1996 (Preamble), namely to provide quality education to all learners in South Africa.

As a direct result of this pandemic, many schools report a high rate of absenteeism among educators - as these diseases adversely affect a person's immune system. When educators are absent, their colleagues are burdened with the responsibility to accommodate their learners too which is, firstly, experienced by them as a nightmare and, secondly, amounts to a disaster as it turns schools into places where learners get *lost*.

Since School Governing Bodies are obliged to establish a social context in which learners can optimally learn, as well as build their dreams and formulate their plans concerning their future, this study places the emphasis on school governance.

To address HIV/aids as a devastating social problem affecting humans' total ecological system and to strengthen the hands of School Governing Body-members, this study's overall objective is to recommend an ecosystemic governance strategy to schools which can deal with the HIV/aids pandemic concertedly.

With the aim of providing an overall orientation to the study, Chapter 1 outlines the research problem. In this regard, various statistical data are alluded to in order to substantiate the fact that HIV/aids is, and continues to be a major challenge to schools. Numerous authors are referred to, stating that the increase in frequency of HIV/aids among the youth is caused by, *inter alia*, learners' temptation to explore their sexual identities through not only experimenting with sex, but also with alcohol, tobacco and drugs, which leads to fornication and promiscuous sexual behaviour.

Chapter 1, moreover, presents the research questions and corresponding objectives. The empirical research design within an interpretive paradigm by way of a phenomenological case study as mode of inquiry is also briefly explained. In line with the latter, the population and sample, as well as the data collection, analysis and interpretation strategies are identified. Other important aspects such as ethical issues, quality assurance, the study's feasibility and possible contributions to education at large are also addressed, while potential challenges and limitations are identified.

As such, this chapter documents the research by providing a theoretical framework, a rationale and justification for the study. The chapter ends with a preview of the potential chapters to follow.

Chapter two provides information obtained through an in-depth literature study on the impact HIV/aids has on education in general and on educators and learners specifically. HIV/aids, leading to a decrease in the supply of education, management and the quality of education, is alluded to with specific reference to educator absenteeism. It is also recognized that the supply of education does not

only depend on the availability of educators and teaching learning materials at schools, but also on the capability of education systems to manage the whole education sector. Following the latter, the impact of the HIV/aids pandemic on education managers, educators and learners with regard to school enrolment, school attendance and dropout from schools is highlighted.

In line with the above, it is shown that schools themselves may be affected by psychological effects due to having HIV/aids in their midst and that discrimination, ostracism and isolation will occur at schools as those infected or ill are treated differently from others. The fact that educators may face the suspension of social and health benefits and/or dismissal from the system and that learners, on the other hand, may face formal suspension by the system or be pressured to leave school if they have not already dropped out, is emphasized.

An ecosystemic strategy is analysed and contextualized to the South African social context in Chapter 3. The interrelatedness of the different systems is accentuated, while the importance of understanding ecosystems and systems-thinking is outlined. To facilitate the latter, various characteristics of systems-thinking are scrutinized. The ecosystemic impact of HIV/aids on educators, specifically, is furthermore discussed, while ecosystemic support as a resilience-promoting resource is charted.

As the main agent of public schools, School Governing Bodies with the function to govern schools is also discussed.

In Chapter 4 the different elements of governance in general are outlined. This is followed by a discussion on school governance while emphasizing the different roles school managers and governors are obliged to play in realizing effective teaching and learning of a high quality to South African learners.

Against the backdrop of this country's new democratic dispensation, focus is placed on school governance entailing, specifically, active participation by all

role-players. Within the broader theme of the study, school governance is, moreover, discussed within an ecosystemic framework.

Chapter 5 elaborates on chapter one with regard to the qualitative empirical design and methods followed in this study. As such, it presents the research methodology with specific reference to the research paradigm, design, mode of inquiry, as well as the methods employed to collect and analyse the data. The trustworthiness and credibility of the findings are also discussed.

Chapter 6 provides the data analysis and interpretation. The researcher's view on an ecosystemic governance strategy is portrayed in Chapter 7. This chapter also presents a literature review on developing and implementing HIV/aids policies for effective school governance with specific prominence placed on combating the impact of the HIV/aids pandemic on South African schools.

The study ends with Chapter 8 providing a summary of the research conducted and by presenting the final findings which, in turn, lead to proposing various recommendations.

UITTREKSEL

'N EKOSISTEMIESE SKOOLBESTUURSTRATEGIE VIR DIE BEKAMPING VAN DIE IMPAK VAN DIE MIV/VIGS PANDEMIE OP LEERDERS EN ONDERWYSERS

Beide nasionale en internasionale navorsing verklaar dat die MIV/vigs pandemie globaal die mees algemene diagnose onder leerders en onderwysers geword het. Wat veral bekommerenswaardig vir die onderwys is, is dat die pandemie nie die hele bevolking in dieselfde mate tref nie, aangesien jong mense tussen die ouderdomme van 15 en 24 (tydens hul produktiefste jare) disproporsioneel geaffekteer word.

Suid-Afrika het spesifiek, in die laaste dekade, 'n eksponensiele groei in die voorkoms van MIV/vigs-infeksies ervaar, terwyl die gevolge van MIV/vigs- verwante sterftes voortdurend deur families, gemeenskappe en skole gevoel word. Verskeie statistiese data verwys na die feit dat MIV/vigs voortgaan om groot uitdagings aan skole te bied wat hul pogings om die hoogste doel van die onderwysstelsel in die breë, soos uiteengesit in die Suid-Afrikaanse Skolewet, 84 van 1996 (Aanhef), naamlik om kwaliteitsonderrig aan alle leerders in Suid-Afrika te voorsien, in die wiele ry.

As 'n direkte gevolg van die pandemie, doen baie skole verslag van 'n hoë afwesigheidsyfer onder onderwysers – aangesien die siekte 'n persoon se immuniteitstelsel nadelig beïnvloed. Wanneer onderwysers afwesig is, word hul kollegas beswaar met die verantwoordelikheid om ook hul leerders te akkommodeer wat, eerstens, as 'n nagmerrie ervaar word en, tweedens, 'n ramp is, aangesien dit skole omskep in plekke waar leerders verlore raak.

Aangesien Skool Beheerliggame verplig is om 'n sosiale konteks te skep waarin leerders optimaal kan leer sowel as hul drome bou en hul planne rakende hul toekoms kan formuleer, plaas die studie klem op skoolbeheer.

Ten einde MIV/vigs, as 'n verwoestende sosiale probleem wat die mens se totale ekologiese sisteem affekteer aan te spreek, en om die hande van Skool Beheerliggame te versterk, is die oorhoofse doel van die studie om 'n ekosistemiese beheerstrategie aan skole voor te stel wat daadwerklik met die MIV/vigs pandemie kan handel.

Met die doel om 'n oorhoofse oriëntasie tot die studie te verleen, omskryf Hoofstuk 1 die navorsingsprobleem. In dié verband word na verskeie statistiese data verwys ten einde die feit dat MIV/vigs tans, en steeds voortdurend, groot uitdagings vir skole bied, te onderskryf. Daar word na veelvuldige outeurs verwys wat aantoon dat die toename in die frekwensie van MIV/vigs onder die jeug veroorsaak word deur, *inter alia*, leerders se versoeking om hul seksuele identiteite te ontdek deur nie net met seks te eksperimenteer nie, maar ook met alkohol, tabak en dwelms, wat lei tot ontug en onbetaamlike seksuele gedrag.

Hoofstuk 1 voorsien, voorts, die navorsingsvrae en ooreenstemmende doelwitte. Die empiriese navorsingsontwerp binne 'n fenomenologiese gevalle- studie as ondersoekende wyse word ook kortliks verduidelik. In lyn met laasgenoemde, word die populasie en steekproef sowel as die data-insameling, analise en interpretasie-strategieë geïdentifiseer. Ander belangrike aspekte soos etiese aangeleenthede, kwaliteitsversekering, die studie se uitvoerbaarheid en moontlike bydraes tot die onderwys in die breë word ook aangespreek, terwyl potensiële uitdagings en beperkinge geïdentifiseer word.

As sodanig, dokumenteer hierdie hoofstuk die navorsing deur 'n teoretiese raamwerk, rasionaal en regverdiging vir die studie te verskaf. Die hoofstuk eindig met 'n voorbeskouing van die potensiële hoofstukke wat volg.

Hoofstuk 2 verskaf inligting bekom deur middel van 'n in-diepte literatuurstudie oor die impak wat MIV/vigs op die onderwys, in die algemeen, en op onderwysers en leerders spesifiek het. MIV/vigs wat lei tot 'n afname in die voorsiening van onderwys, bestuur en die kwaliteit van onderwys, word spesifiek uitgelig met verwysing na onderwyser-afwesigheid.

Daar word ook erken dat die voorsiening van onderwys nie net van die beskikbaarheid van onderwysers en onderrig-leermateriaal afhang nie, maar ook van die vermoë van die onderwysstelsel om die hele onderwysektor te bestuur. Na laasgenoemde, word die impak van die MIV/vigs pandemie op onderwysbestuurders, onderwysers en leerders met betrekking tot skool inskrywings, skoolbywoning en uitvalle uit skole uitgelig.

In lyn met bovermelde, word aangetoon dat skole self geaffekteer mag word deur sielkundige gevolge weens MIV/vigs in hul midde en dat diskriminasie, uitstoting en isolasie in skole sal voorkom aangesien diegene wat geïnfekteer of siek is, anders as ander behandel word. Die feit dat onderwysers die opskorting van sosiale en gesondheidsvoordele en/of ontslag uit die stelsel in die gesig mag staar en dat leerders, aan die ander kant, formele skorsing uit die stelsel in die gesig staar of onder druk geplaas word om die skool te verlaat indien hul nie reeds uitgeval het nie, word ook beklemtoon.

'n Ekosistemiese strategie binne die Suid-Afrikaanse sosiale konteks word geanaliseer en gekonseptualiseer in Hoofstuk 3. Die interverwantskap van die verskillende sisteme word geaksentueer, terwyl die belangrikheid van die begrip ekosisteme en sistemiese denke uitgewys word. Ten einde laasgenoemde te fasiliteer, word verskeie eienskappe van sistemiese denke bespreek. Die ekosistemiese impak van MIV/vigs op onderwysers, spesifiek, word voorts, bespreek, terwyl ekosistemiese ondersteuning as 'n weerstands-bevorderende bron gekarteer word.

As die vernaamste agent van openbare skole, word Skool Beheerliggame, belas met die funksie om skole te bestuur, ook bespreek.

In Hoofstuk 4 word die verskillende elemente van beheer in die algemeen geskets. Dit word opgevolg deur 'n bespreking van skoolbestuur terwyl klem geplaas word op die verskillende rolle wat skoolbestuurders en -beheerders verplig is om te speel ten einde effektiewe onderrig en leer van 'n hoë standaard aan Suid-Afrikaanse leerders te verwesenlik.

Teen die agtergrond van hierdie land se nuwe demokratiese bedeling, word fokus geplaas op skoolbeheer wat spesifiek aktiewe deelname deur alle rolspelers insluit. Binne die breër tema van die studie word skoolbeheer binne 'n ekosistemiese raamwerk voorts bespreek.

Hoofstuk 5 brei op hoofstuk een voort met betrekking tot die kwalitatiewe empiriese ontwerp en metodes wat tydens die studie gevolg is. As sodanig, verskaf die hoofstuk die navorsingsmetodologie met verwysing na die navorsingsparadigma, ontwerp, ondersoekende wyse, sowel as die metodes wat gebruik is om data in te samel en te analiseer. Die geloofwaardigheid en betroubaarheid van die bevindinge word ook voorsien.

Hoofstuk 6 weerspieël die data analise en interpretasie. Die navorser se siening van 'n ekosistemiese bestuur strategie word weergegee in Hoofstuk 7. Die hoofstuk verskaf 'n literatuuroorsig van die ontwikkeling en implementering van 'n MIV/vigs-beleid vir effektiewe skoolbeheer, met spesifieke klem op die bekamping van die MIV/vigs pandemie in Suid-Afrikaanse skole.

Die studie eindig met Hoofstuk 8 wat 'n opsomming van die uitgevoerde navorsing en die finale bevindings bevat wat, op hul beurt, gelei het tot verskeie aanbevelings.

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CHAPTER 1

ORIENTATION

1.1 INTRODUCTION AND VALIDATION OF PROBLEM

Both national and international research reveal that, in most parts of the world, the Human Immunodeficiency Virus (hereafter referred to as HIV) and the Acquired Immune Deficiency Syndrome (hereafter referred to as aids) have become the most common diagnosis among learners and educators (Tucker *et al.*, 2003:576; World Health Organization, 2003:7). As a result, many schools in South Africa are likely to see a huge increase in the frequency of infection and the dramatic embodiment of this pandemic among learners and educators over the next years (Olivier *et al.*, 2003:392). In outlining the effects of HIV/aids, Basson *et al.* (2005:215; *cf.* 2.3) suggest that it is a progressive illness which changes from an asymptomatic stage to full blown aids, making it impossible for the infected person to operate effectively.

Statistics (World Health Organization, 2003:178; *cf.* 2.2) reveal an estimated 250 new infections daily in South Africa, half of which occur among 15 to 24- year- olds (World Health Organization, 2008) while research estimates that the infection rate among educators constitutes 12% of the general population (Department of Health, 2003:159). According to Frederickson *et al.* (2007; *cf.* 2.2), educators are at a higher risk of becoming infected with HIV/aids than the general population, because of their fairly high socio-economic status and a lack of understanding about how the virus is transmitted. Louw (2008:219), moreover, indicates that 1700 persons are infected daily in South Africa. As such, Welman (2010:17) opines that the world is only minutes away from midnight. Figures also show that around one in seven educators was infected with HIV by the end of 2003, while educator losses average 1.5% biannually. An increasing occurrence of illness and deaths among younger persons is also disclosed (Kidane *et al.*, 2003:38).

The UNAIDS Report of 2004 (Nelson Mandela Children's Fund, 2006:1), in addition, indicated that there were approximately 1.1 million aids-affected orphans (referred to by Francis and Rimmensberger (2008:603) as *the socially marginalized*) in South

Africa at the end of 2003. It is, thus, not surprising that research conducted by Steyn *et al.* (2010:182; *cf.* 2.5) on the future expectations of adolescents in South Africa show that HIV/aids is singled out as the biggest problem in this country.

A main concern in this regard, as avowed by Brewer (2003:144), Barry (2006:153), as well as Pillay and Wasielewski (2007:1), is that learners, due to ignorance, lack of knowledge and illiteracy concerning how HIV is contracted; become sexually active at a very tender age. To the contrary, Visser (2007:678; *cf.* 2.4) refers to research results indicating that many young people are, despite sound knowledge about sexual health risks, HIV/aids and Sexually Transmitted Infections (hereafter referred to as STIs), still at risk because of high-risk sexual behaviour. Reasons for the latter being that the youth's sexual behaviour tends to be impulsive as they rather choose to live somewhat careless lives (Amoakoh-Coleman, 2006:972; *cf.* 2.2 & 2.5) and are greatly influenced by peer pressure.

In this regard, Welman (2010:17) advocates that humans tend rather to live in idyllic defiance or make mere concessions, aiming at making them believe that they have, in fact, moved forward. The poor social context many are living in, low self-esteem, limited future opportunities and a partial sense of power to resist are also, according to Francis and Rimmensberger (2008:611; *cf.* 3.2), reasons hampering them to put their knowledge into action and entrapping them into well-known and often deadly behavioural patterns. While referring to the fact that HIV/aids tests the ethical character of the human race, Shisana *et al.* (2004:286) caution that if the vicious circle is not broken, humans stand the danger of collectively slipping back into the ignorance, foolish fear and inhumane conduct that characterized the dark ages.

Efforts must therefore be adjusted continuously towards changing perceptions, attitudes and dicey sexual behavioural patterns which provide the fertile grounds for STIs and the spread of HIV/aids (Amoakoh-Coleman, 2006:972; *cf.* 3.3.1.4). Without such changes, Welman (2010:20) cautions that humans are socially rapidly approaching a tipping point beyond which fundamental change will be forced upon them.

On the other side of the spectrum, as highlighted by Cross (2001:133; *cf.* 2.4.2.1), Badcock-Walters (2000:237) and Coombe (2000b:36), many schools report a high

rate of absenteeism among educators - due to illness caused by HIV/aids as these diseases unfavourably affect a person's immune system - as a major and increasing problem which are expansively disrupting all school activities in South Africa. From the available estimates, it is calculated by Shisana *et al.* (2005:3; *cf.* 2.3, 2.4.1 & 2.4.3) that each infected educator loses a total of 18 months of working time due to aids-related secondary illnesses. Luzinda *et al.* (2000:140; *cf.* 2.4.2.1) state that when an educator falls ill or dies, his/her learners are either merely taken over by another educator or combined in classes with other learners, thus increasing the learner-educator ratio and the teaching burden on other educators (Van Wyk & Lemmer, 2007:303; *cf.* 3.3.1.3 & 3.3.1.7). Such learners are often even left untaught. Whichever way, learners end up suffering within this vicious circle.

As emphasized by various researchers (Mubangizi, 2005:128; Donahue, 2000:78; Goyer & Gow, 2001:130), HIV/aids is taking revenge on the psychological health and mental functions of learners and educators, as their memory, concentration and creativity are unconstructively influenced. Desmond *et al.* (2000:39) in addition, show that HIV/aids, as a social factor, has an unfavourable effect on behavioural competence and efficiency, interpersonal relationships and personal output. Even when able to attend school, emotional stress experienced by them is major, leading to lesson preparation, homework and classroom interaction often being a last priority (Hepburn, 2002:91). Underscoring the latter, Louw (2008:219) indicates that this pandemic has a weighty impact on South Africa's total social fabric.

Because of the physical and psychological difficulties involved (*cf.* 2.4 & 4.4), it is not surprising, as pointed out by Kelley (1999:23) and Ayele *et al.* (2003:373), that both physicians and psychologists have suggested that experiencing HIV/aids will have a negative effect on an infected learner and educator in their general functioning at school. Louw (2005:196) also emphasizes that strained independence placed on HIV/aids orphans may have a lasting impact on their psychological development. They may, *inter alia*, develop undecided feelings towards the ill, become disparaging, even entertaining thoughts of suicide (Louw, 2008:220). To cope with the latter, school governors are challenged, as pointed out by Xaba (2006:25; *cf.* 2.4, 3.2; 4.3.1), to provide school environments that are safe sanctuaries for all learners, which does not refer only to the absence of violence and crime, but also to the

eradication of psychological injuries, although not as regularly reported as physical injuries. This is extremely important since the ability to respond with empowered behaviour to the challenges HIV/aids presents, are closely linked to levels of self-esteem and interpersonal negotiating skills (Francis & Rimmensberger, 2008:604; *cf.* 2.5).

In this regard, Booysen *et al.* (2007:294) consider humans' physical and emotional well-being as mutually dependent on each other. A study done by these authors on socio-economic issues influencing well-being indicated that those whose emotional well-being was improved, also experienced improvement in their physical health (2007:324). By regarding HIV/aids as more than a simple physical disease or medical condition, these authors also pointed out that HIV/aids treatment should be aimed at benefitting patients, not only in respect of their health, but also in respect of their general quality of life. As such, they (2007:294) propose that the ultimate goal of any HIV/aids interventional programmes should be to enhance the scope, depth and intensity of their well-being and happiness.

Since a school's overall climate - its heart and soul - is made up by psychological and institutional characteristics (Pretorius & De Villiers, 2009:33; *cf.* 3.3.1.6), it is evident that HIV/aids, directly, also negatively influences a school's climate, which in turn affects the attitudes, motivation and behaviour of all attending it. Consequently, the whole education system is disrupted, teaching aptitude is decreased and the quality of instruction limited, all with the effect that education as a whole cannot function and develop efficiently (Van Wyk & Lemmer, 2007:303; *cf.* 2.3 & 3.3.1.7).

Some insight into what this apocalyptic scenario spells out for the future functioning of teaching and learning in South Africa, especially, can be perused through an examination of the potential manifold effects of HIV/aids on education. Such effects, as emphasized by Barnett and Whiteside (2002:105), as well as Louw *et al.* (2009:206), include, *inter alia*, a decline in school enrolment (*cf.* 2.5.1) due to the death of learners; a decline in the quality of education due to educator absenteeism (*cf.* 2.4.2.1) and death; the erratic performance of duties by educators, and a depletion of education budgets, owing to the double payment of educators (educators officially absent and substitute educators).

As if the above is not enough, HIV-infected and aids-suffering learners and educators also undergo emotional and physical stress and pains that hamper their effective learning and teaching abilities. HIV/aids-orphanaged learners, in addition, are left without parental care, guidance and support (Maree, 2008:64; *cf.* 2.4). To worsen the situation even further, such educators and learners also have to face being discriminated against due to their HIV positive status (Barry, 2006:153&221; HIV/AIDS: Care and Support, 2002; *cf.* 2.4), all of which in turn have a devastating impact on the general functioning of the education system at large.

Schools with high numbers of learners and educators infected, affected and/or disillusioned by HIV/aids (Steyn *et al.*, 2010:170) cannot function efficiently or effectively. In this regard, Smith and Stones (2001:159; *cf.* 2.2) point out that South African learners and educators face significantly greater challenges than their counterparts in countries where society is more stable. Learners infected and/or affected, cannot cope with learning and cannot perform their learning tasks to the fullest of their abilities (Kelly, 2000:43; *cf.* 2.4). Infected and/or affected educators, conversely, cannot teach effectively since they are often ill and/or absent from school. HIV/aids does, however, not only affect teaching and learning. It also influences the governance of schools.

School Governing Bodies, as pointed out by Serfontein (2010:94; *cf.* 4.2), legally have the power to establish the overall character and ethos of public schools. Most significant hereof, is the democratic governance of schools (*cf.* 4.7.1). As such, School Governing Bodies are obliged to establish a social context (infrastructure; *cf.* 2.4 & 3.3.1.2) in which learners can build their dreams and formulate their plans concerning their future (Van Wyk & Lemmer, 2007:300; Barry, 2006:155; Larson, 2002:1156-1157; *cf.* 3.5). The creation of a healthy school culture is, moreover, important as it directly, as avowed by Bechan and Visser (2005:67), influences the performance of schools. As asserted by these authors, it influences not only the overall effectiveness of schools, but also the unity, motivation and consensus among their role-players.

Schools are, as pointed out by Dekker and Lemmer (1993:218; *cf.* 2.4), additionally responsible for preparing learners for adulthood and a life of responsible decision-making. With specific reference to the anxiety caused by HIV/aids, Naidu *et al.*

(2008:11; *cf.* 2.4.2) indicate that schools need to be sources of support and encouragement to its role-players, while Frank *et al.* (2008:394) emphasize that preventive efforts (actions directed at both removing the causes of the problem – primary prevention - and containing the problem so that it does not worsen – secondary prevention – (Donald *et al.*, 2002:28)) need to be aggressively up-scaled.

The foregoing paragraphs have indicated the necessity for implementing a governance strategy in order to deal concertedly with the HIV/aids pandemic. In this regard, Pretorius (2003:6; *cf.* 4.4), Dean and Moalusi (2002:22) and Groenewald (2000:46) propose an ecosystemic governance strategy. Although such a strategy may not be a recipe for instant success, it is argued that providing quality education is much more likely to fail and, at the same time, to lose educator and learner human resources without it. An ecosystemic governance strategy is suggested since it can (Pretorius & De Villiers, 2009:36):

- serve as a framework for decisions and for secure support and endorsement of funds to assist and support learners and educators infected with and affected by the HIV/aids pandemic (*cf.* 4.5);
- provide a basis for more meticulous planning in dealing with the probable areas of HIV/aids impact on learners, educators and the education system in general (*cf.* 4.5.1);
- explain an HIV/aids vision and mission statement to learners, educators, parents and communities in order to inform, motivate and involve them in the struggle against this deadly pandemic (*cf.* 3.3.1);
- assist benchmarking, performing and monitoring schools in dealing with this pandemic; and
- stimulate organizational change which can become a building block for future plans on combating HIV/aids (*cf.* 3.3.1.2).

Alemayehu (2003:23) declares that there is a need for a suitable governance strategy which is both practical and allows for the members of School Governing Bodies (*cf.* 4.7) to think strategically and act operationally. According to the Department of Social Development (2001:147), the prevention and control of STIs are vital elements in the response to HIV/aids as it not only presents another disease weight on society, but also facilitates the spread of HIV (Bana *et al.*, 2009:154). It is,

consequently, important that capacity building be emphasized to speed up HIV/aids prevention and control measures taken. In this regard, Bentwitch (2003; *cf.* 2.2, 3.3.1.6 & 4.3) underlines the importance that schools should work together with all sectors of government and all community role-players in the fight against HIV/aids. Moran (2004:11; *cf.* 3.5) also highlights the fact that it is crucial for learners and educators with HIV/aids to be involved in all prevention, intervention and care strategies at schools.

Despite the value of an educational governance strategy, little empirical research has, however thus far, been undertaken on the need for such a strategy in dealing with the HIV/aids pandemic in South African schools. Since an ecosystemic governance strategy heeds the social context of schools, it is of the essence to conduct such research in South Africa which is said to be among the top nations depredated by this deadly infection (Colvin, 2000:335; Stillwaggon, 2000). South Africa is second only to India in numbers of people living with aids, yet India has twenty times the population of South Africa (Department of Social Development, 2001:61).

It is, furthermore, noted by various authors (Swanepoel *et al.*, 2007:74; Kasoma, 1999:122; Linda, 1999:110; Mchombu, 1999:136) that a, somewhat overstated, spotlight has thus far been placed on HIV/aids politics and too little on the applicable scientific and social issues that surround it. As such, these authors suggest that this pandemic be viewed from alternative perspectives as this study aims to do.

The current high occurrence of the HIV/aids pandemic as well as the fact that it still continues to rise clear of control, justifies this study aiming at suggesting a governance strategy which can effectively combat the HIV/aids pandemic.

1.2 PURPOSE STATEMENT

The purpose of this qualitative phenomenological case study inquiry was to investigate the need for an ecosystemic governance strategy in order to deal with the HIV/aids pandemic at South African schools. The data was collected by means of a researcher designed interview schedule among male and female members of School Governing Bodies who participated in the research.

At this point an ecosystemic school governance strategy is defined as a plan that takes note of the social context of schools (Colvin, 2000:335; Stillwaggon, 2000; cf. 3.2).

1.3 RESEARCH QUESTIONS

In order to recommend an educational governance strategy for dealing effectively with the HIV/aids pandemic at South African schools, the following questions needed to be addressed:

1.3.1 Primary research question

The main question that drove the execution of this research was:

- What does an ecosystemic school governance strategy for combating the impact of the HIV/aids pandemic look like?

1.3.2 Secondary research questions

- How can the impact of the HIV/aids pandemic on education in South Africa be determined?
- What do ecosystemic theories have to offer in order to suggest a school governance strategy?
- What does South African school governance comprise?
- Can an ecosystemic school governance strategy be recommended to combat the HIV/aids pandemic on learners and educators?

1.4 AIMS OF THE STUDY

This research exists to investigate the extent of the effect of HIV/aids on South African education. By way of a literature review and empirical research design, it aims at making suggestions for and developing a strategic governance strategy which can be successfully adopted by schools in order to eco-systemically deal with the HIV/aids pandemic. This is done since real-life problems can only be addressed and solved through human action (Mouton, 2004:53).

The overall aim was primary effectuated by establishing what an ecosystemic school governance strategy for combating the impact of the HIV/aids pandemic should look like and, secondary, by:

- determining the impact of the HIV/aids pandemic on education in South Africa;
- describing what ecosystemic theories have to offer in order to suggest a school governance strategy;
- explaining what South African school governance comprise; and
- ascertaining whether an ecosystemic school governance strategy can be recommended to combat the HIV/aids pandemic on learners and educators.

1.5 CONCEPTUAL FRAMEWORK

This thesis was conceptualised in terms of and based on the conceptual framework of ecosystemic strategies. Ecosystemic strategies were conceptualised in terms of the view point of Bronfenbrenner's (1997) and Pilon (2003; *cf.* 3.2).

Since human behaviour composes of multiple-realities, Cloete (2010:622&624) highlights the fact that it cannot be measured by single indicators. It rather necessitates combinations of indicators leading to social accounting. An ecosystemic strategy allows for the latter as it considers factors in the immediate environment of the human being as well as the mutual interdependence and interaction between these factors when trying to understand and/or alter human behaviour (Steyn *et al.*, 2010:171; *cf.* 3.2).

An ecosystemic governance strategy to combat the HIV/aids pandemic in South African schools, is suggested since HIV/aids is identified as a socially constructed pandemic due to the fact this disease is transmitted mainly by means of humans' sexual behaviour (*cf.* 2.2). Schools, as institutions responsible for educating the youth to responsible, well-adjusted citizens, play an immense role in moulding the youth. Schools are essential sub-systems in all humans' ecosystems contributing to guiding and shaping their future attitudes and behaviour (*cf.* 3.2). School Governing Bodies are responsible for the governing of schools and creating the overall ethos of schools (*cf.* 4.2).

In view of this, and the fact that HIV/aids presents enormous challenges to schools in governing schools effectively to provide quality education to all learners, the need for assisting school governors by providing them with a governance strategy that can combat this pandemic successfully, is evident.

1.6 RESEARCH METHODOLOGY

Leedy and Ormrod (2005:4) explain the importance of research by defining research as a systemic process of collecting, analysing and interpreting data in order to increase understanding of a phenomenon in which interest is shown or over which concern is expressed. In explaining research methodology, Mouton (2009:26; *cf.* 5.2) refers to it as the route followed and appropriate modes employed to reach the set objectives of a study.

1.6.1 Research paradigm

This research was based on a social constructivist paradigm. Social constructivism is defined as research that aims at reaching higher levels of understanding regarding life and the situation at work (Creswell, 2009:8; *cf.* 5.2.1). Such a paradigm frequently combines interpretivism with qualitative research, so that researchers can try to find the intricacies of viewpoints. The same author points out that this is done by relying as far as possible on the perspectives of the research participants.

As reality is not objectively determined, but is socially constructed (Nieuwenhuis, 2007a:59), this study aimed at discovering the underlying assumptions held by the researched participants regarding their own behaviour when governing schools. This was done by studying the participants within their own social contexts.

1.6.2 Research design

A qualitative, empirical (social) research design (*cf.* 5.2.2) was selected for this research since real-life objects (human behaviour, schools as social organizations and a social intervention programme) were studied (Mouton, 2004:51). Qualitative research, as pointed out by Nieuwenhuis (2007a:51), is concerned with understanding the processes as well as the social and cultural context (contextual analysis) which underlie various behavioural patterns by interacting with and

observing the participants in their natural settings and focusing on their individual interpretations. Creswell (2009:4; cf. 5.2.2), concurrently, states that qualitative research is a means for exploring and understanding the meaning individuals ascribe to a social or human problem. Since this study set out to research the affects of HIV/aids on education and to suggest a governance strategy that can best combat this pandemic, it was important to describe this phenomenon in terms of the meanings imparted by the participants (Creswell, 2009:26). Fouché and De Vos (2009:93) also show that studies aiming at generating a new strategy are more often of a qualitative than a quantitative nature.

Emphasis was placed on inter-subjective meanings which were regarded as crucial to achieve a thorough understanding of the HIV/aids pandemic and its effects on education (Jansen, 2007:21). Since it was perceived that the truth regarding this pandemic is relevant and subjugated to subjective elements, the social context as well as the norms and standards of educational role-players within their communities were studied in order to understand their behaviour and to suggest ways of changing it in order to bring about more responsible behaviour that can prevent the spread of this pandemic.

1.6.3 Mode of inquiry

A research design is used to describe the procedure for conducting a study with the aim of finding appropriate answers to research questions (Maree & Van der Westhuizen, 2007:33-34). The mode of inquiry, in addition, informs the design. Bearing the ecosystemic nature of this study in mind, an interactive mode of inquiry (cf. 5.2.3) was employed.

From a qualitative perspective, a phenomenological case study (schools as organizations – bounded system; cf. 5.2.3), as mode of inquiry, was employed (Fouché, 2009b:269). Seeing that case study research entails a *systematic inquiry into an event or a set of events to describe and explain the full phenomenon* (Nieuwenhuis, 2007b:75), it was selected for this research to study School Governing Body members' behaviour in social context regarding the governance of schools within the ambit of HIV/aids as a contemporary phenomenon. A phenomenological case study (cf. 5.2.3), being of a subjective and investigative

nature, is used since it placed the researcher in the position to value the meaning of the occurrence of HIV/aids in schools, rather than simply measuring observable events pertaining to this pandemic (Jack & Raturi, 2006:349). This mode of enquire is, accordingly, conducted to study the effects of HIV/aids on education (consisting of numerous individuals as members of School Governing Bodies), to learn from their experiences, to gain a better understanding of HIV/aids as a social issue (Fouché, 2009b:272) and to decide the nature of a governance strategy that could, productively, assist in combating the HIV/aids pandemic at schools.

It is noted that the findings of a qualitative research such as this cannot be generalized (McMillan & Schumacher, 2001:580) to the broader public. This strategy was, nevertheless, selected to suggest a government strategy that can be used as a guideline by all School Governing Bodies.

1.6.4 Data collection and data analysis strategies

Since most qualitative studies do not treat data collection (*cf.* 5.2.4.1) and data analysis (*cf.* 5.2.4.2) as two separate processes, but regard them as one ongoing, cyclical and non-linear process (Nieuwenhuis, 2007b:81), these two concepts are addressed simultaneously.

Leedy and Ormrod (2005:2) state that, although research projects vary in complexity and duration, they typically have the same distinct characteristics. As such, research originates with a specific question, problem or hypothesis which is divided into more manageable subgroups in order to guide the research. In line herewith, research requires a specific plan of proceeding and a clear articulation of a goal. Research which is by nature cyclical or more exactly, helical, requires the collection and interpretation of data in an attempt to resolve the problem that initiated the study, while certain critical assumptions are accepted.

Data was, accordingly, collected by means of a literature study, observations, document analysis and in-depth interviews. Data was, alongside, analysed inductively to assist the researcher in identifying all the multiple realities potentially present in the obtained data. This is in line with an interpretive approach assuming that multiple realities exist (Maree & Van der Westhuizen, 2007:37).

Following an interpretive theory based on the postulation that there is not one reality, but many, the obtained data was analysed inductively in order to identify the multiple realities potentially present in the data. Because of the latter, this study is carried out in the natural context to reach the most possible understanding thereof (Maree & Van der Westhuizen, 2007:37; *cf.* 1.6.1; 5.2.4.3.1).

In this regard, the use of inductive reasoning allowed the researcher to move from his specific observations of particular School Governing Body members to discover a pattern that represented some degree of order among all human systems (Babbie, 2001:34). Moreover inductive analysis was selected as it is assumed that HIV/aids prevention and education in essence should, as pointed out by Amoakoh-Coleman (2006:972; *cf.* 1.2), consist of complete aspects that cannot be understood in isolation (Maree & Van der Westhuizen, 2007:37); but rather that a multi-dimensional approach using a holistic approach is needed. This is also in line with an ecosystemic strategy placing emphasis on a movement from the parts to the whole (*cf.* 3.3.1.1).

1.6.4.1 Literature study

As the first step of the empirical study, a literature study of existing literature was conducted to systematically, methodically and accurately perform this research (Mouton, 2004:55&86) as it contributes towards a clearer understanding of the nature and background of the problem identified (Fouché & Delpont, 2009b:123).

Sources that were scrutinized include current, international and national journals written by experts, papers presented at professional meetings, dissertations by graduate students and reports written by school and university researchers as they provided the most recent research and developments in the field of education. Books on HIV/aids, as secondary sources, were also studied for attaining an overview, obtain general knowledge and have access to pure facts (McMillan & Schumacher, 2001:113). The Constitution of the Republic of South Africa (Act 108 of 1996) and the South African Schools Act (Act 84 of 1996) were, in addition, consulted as legislation provides a governmental and departmental policy theoretical legislative framework for the governance of schools.

Primary sources are important, as a review thereof provided the researcher with a theoretical perspective (Kruger *et al.*, 2009:217) and revealed previous research findings regarding HIV/aids (Mouton, 2004:87). As such, a review of literature placed the researcher in a position to *look again* (re + view) at what others have done in similar areas, though not necessarily identical to his research topic (Leedy & Ormrod, 2005:66). The latter facilitated the researcher in gaining more insight into his identified research problem (McMillan & Schumacher, 2001:108), to build a logical framework for his study and set it within a fixed mode of inquiry and a perspective of related studies (Fouché & Delport, 2009b:123); as well as to chart out the main issues in the field being studied (Strydom, 2009e:252).

The literature study, for that reason, allowed the researcher to eventually gain adequate knowledge on his topic and assisted him in pinning down his own research problems (Leedy & Ormrod, 2005:95). A critical review of literature thus enabled the researcher to evaluate preceding research that relates to HIV/aids as a social phenomenon, leading to the development of a framework that would permit the results of this study to be interpreted in relation to existing theory (Fouché & Delport, 2009b:124).

Other benefits pertaining to a literature review include, *inter alia*, that it offers new ideas, perspectives and approaches. It makes the researcher attentive of other researchers who conducted work in the field (Fouché & Delport, 2009b:124). A review of literature also serves as a tool to accustom the researcher with the methodological and design problems others underwent while conducting studies similar to his and the methods used to deal with such problems (Mouton, 2004:87; Fouché & Delport, 2009b:124). While studying literature, the researcher is bound to come across pertinent data sources not known to him. It can introduce the researcher to measurement tools that other researchers have developed and used effectively and also assists the researcher to interpret and make sense of his findings and finally tie results to the work of those who have preceded him (Creswell, 2009:25; Strydom, 2009b:148).

While conducting a literature study, as a central part of the research, the researcher may comprehend that his topic is one worth studying, as others have invested

substantial time, effort and resources in studying it, which; in turn, will strengthen his confidence (Leedy & Ormrod, 2005:96).

Although phenomenological research does not often use literature to set the stage for the study (Creswell, 2009:26), a literature review was included in the introduction of this study to provide a background to the problem (McMillan & Schumacher, 2001:574) of HIV/aids in South Africa that has led to the need of the study and; in separate sections; to outline the problems associated with this pandemic further and to set the stage for evaluating the appropriateness of an ecosystemic school governance strategy in fighting the HIV/aids pandemic successfully in South African schools.

1.6.4.2 Observations, document analysis and in-depth interviews

Evaluation research frequently uses all existing data collection methods. This, more often than not, involves various forms of structured and semi-structured methods (Mouton, 2004:160). Data was collected while observing the participants in their natural settings (Creswell, 2009:175; *cf.* 5.2.4.1) where they experience the impact of HIV/aids. Observations included talking to School Governing Body members and discussing their involvement and actions within their particular school contexts. Data was, moreover obtained by analysing existing HIV/aids Policies.

The researcher utilized personal, open-ended, semi-structured interviews, as data collection instruments, as they were certain to ensure a representative body of data on the views of the participants regarding the effects of HIV/aids on education and the most fitting governance strategy to combat this pandemic productively (*cf.* 5.2.4.1).

The HIV/aids policies compiled by the participant schools were, alongside, analysed to obtain a more holistic, coherent and interpretative view of the inherent structures already put in place by the School Governing Body participants and to establish their self-understanding regarding the governance of schools within the ambit of this pandemic (Mouton, 2009:169; *cf.* 5.2.4.1).

1.6.5 Population and sampling

For scientific purposes, sampling should be done systematically in order to obtain a representative (an underlying epistemic criteria for validity) sample of the target population which should be clearly defined (Mouton, 2009:110&132).

1.6.5.1 The population

Qualitative research requires the data to be collected, to be rich in description of people and places. The population thus refers to the study object consisting of individuals, groups, organizations, human products as well as events (Welman *et al*; 2010:52). As such, the decision taken by the researcher on how the sample will be framed and developed had to take into account the identification of sources rich in information (Fouché & Delport, 2009a:84; *cf.* 5.2.4.3).

A research population is a term that sets boundaries on the study units (Strydom, 2009c:193). All members of School Governing Bodies (principals, learners, parents and educators) of public and private schools in the township schools of the Free State province were initially considered to be the target population as entities in which all measurement of interest to the researcher are represented (McMillan & Schumacher, 2001:169). Because of the large number of schools in this province, which would take long to visit and lead to incurring huge financial implications, it has been decided to limit the target population to the public township schools in the Northern District of Fezile Dabi in the Free State province which is also more accessible to the researcher, making it possible to collect data personally, accurately and precisely (Fouché, 2009a:118, *cf.* 5.2.4.3.1).

Township schools were selected against the background of the radical changes which occurred in South Africa over the last decade. Social structures changed with regard to, *inter alia*, rapid urbanization, a major collapse of family life and a new permissiveness leading towards increased levels of crime and the feared HIV/aids pandemic. Since many people left the Free State and moved to richer employment opportunities in Gauteng, the rural areas of the Free State were left isolated, vulnerable, powerless, impoverished and open to the collapse of values and norms, as well as the consequential moral looseness leading to it being prone to the

HIV/aids pandemic which make them an ideal population to be premeditated for purposes of this study.

The population was, thereupon, divided into two homogeneous, non-overlapping groups or strata (h), namely public, township schools in the Parys area (h_1) and public, township schools in the Vredefort area (h_2) forming part of the Fezile Dabi Education District of the Free State. This was done due to the Parys and Vredefort areas forming one natural subgroup of the 5 educational districts in the Fezile Dabi Education District. The Parys district has 8 primary public schools and 5 public secondary schools ($h_1=13$), while the Vredefort district is home to 3 public primary schools and 2 secondary schools ($h_2=5$; DoE:Free State). This brought the total population of the study to a total of 18 public township schools ($N=18$).

1.6.5.2 Sampling strategy

Sampling, according to Nieuwenhuis (2007b:79), refers to the process of selecting a portion of the population for a study representative of the target population. The sample is then studied in an effort to understand the population from which it was drawn (Strydom, 2009c:194).

In order allocate a sample size (n) from the identified strata (h) and population ($N=18$) for the study, the researcher employed the method of proportional allocation according to which a number is allocated to each stratum in proportion to its populations size as suggested by Maree and Pietersen (2009:175). With the aim of selecting a stratified sample size of 8 schools, the sample size was, accordingly allocated as follows:

$$h_1=13: (13/18) \times 8 = 6 \text{ and } h_2=5: (5/18) \times 8 = 2.$$

	Population size	Sample size (proportional allocation)
Stratum A (Parys)	13	6
Stratum B (Vredefort)	5	2
Total	18	8

Table 1.1: Sample size

This led to the researcher selecting 6 (3 secondary and 3 primary) schools from the Parys area and 2 (1 secondary and 1 primary) schools from the Vredefort area.

In order to select the 8 schools, the researcher had to use either probability or non-probability sampling strategies (Maree & Pietersen, 2009:172; Mouton, 2009:36; *cf.* 5.2.4.3.2).

With the aim of systematically drawing a sample that could be regarded as being representative, valid and unbiased, probability sampling was selected. The latter was chosen as it allows, as put forward by Mouton (2009:111), for certain conclusions to be drawn logically from the empirical evidence obtained from such a sample. Since the aim of this study was to follow a contextualised strategy to study school governance because of its intrinsic and immediate contextual significance to combat the HIV/aids pandemic in order to recommend an ecosystemic governance strategy, probability (objective) sampling moreover assisted to; afterwards; integrate the conclusions drawn within a framework of an existing social scientific theory, namely ecosystemic theories.

Within the framework of probability sampling, a stratified sampling method (*cf.* 5.2.4.3.2) was employed. This implied that the participants were selected because of some defining characteristics that made them the richest possible holders of the data needed to answer the research questions. In line with this, the researcher selected participants with the specific purpose of attaining data on HIV/aids and governance strategies employed at schools (Maree & Pietersen, 2007:178; Strydom, 2009c:202; *cf.* 5.2.4.3.1).

Participants were selected on the basis of the researcher's knowledge of the population and the participants who were judged to be best suitable for providing the necessary information to address the purpose of this research as proposed by McMillan and Schumacher (2001:175). Since the aim was to study school governance strategies, the researcher studied the various township public schools, forming part of his targeted population, in order to select schools who have well established School Governing Bodies that are actively involved in their schools' governance.

1.7 QUALITY ASSURANCE

Credibility and trustworthiness were taken cognisance of in order to assure the quality of the research results. The latter are enhanced by utilizing triangulation as a navigation strategy to steer the researcher in reaching findings from data collected by means of a combination of methods, namely interviews, observations and document analysis, allowing for studying the effects of HIV/aids on schools from a variety of perspectives and checking results thus obtained. This is done to reduce the inherent limitations brought along by individual data collection strategies and methods, constraining researchers from gathering holistic insights (Jack & Raturi, 2006:345-6). Mouton (2009:156-166; *cf.* 5.3) underscores the latter by indicating that triangulation allows the researcher to use multiple collection methods, to complement each other and, subsequently, to counter balance their respective shortcoming.

These aspects are, in more detail, attended to in Chapter 5 (*cf.* 5.3) of the study.

1.8 CONTRIBUTION OF THIS STUDY

According to Creswell (2005:44); research methods are exercised to add new generated information on a topic or issue by addressing the gaps that may exist in present knowledge. The results of this study are aimed at expanding current knowledge and informing existing practices through developing new strategies regarding the governance of schools to combat the HIV/aids pandemic. New insights are also brought along in terms of providing information on the importance of an ecosystemic governance strategy to combat the influence of HIV/aids on the education system.

This study facilitates in broadening existing knowledge regarding the impact of HIV/aids on South African schools. It also aims to help to add new information regarding the effects of the HIV/aids pandemic on infected and affected role-players in South African schools.

Present knowledge was replicated by testing old results with specific participants at a new research site. By researching new ideas, existing knowledge was extended and informed (Creswell, 2005:45). As such, the focus of this research was placed on the

quality and depth of the information collected and not on the scope or breadth thereof (Nieuwenhuis, 2007a:51). In line herewith, this research endeavoured to broaden current perspectives by introducing the voices of social groups whose views have not often been heard or have been silenced in the past, namely School Governing Body members as part of township schools.

This study aims at suggesting a strategy to lessen the impact of the HIV/aids pandemic on South African education. It is through such a strategy that suggestions are made to highlight the plight of HIV/aids on education and to empower School Governing Body members and through them the broader community on tackling the impact of the HIV/aids pandemic on education

Finally, the study assists in making all concerned with education aware of the important role they have to play in helping to provide care and support for infected and affected learners and educators at South African schools. It also attempts to motivate all role-players in education to cooperate in striving at protecting the overall quality of education in South Africa.

1.9 FEASIBILITY OF THE RESEARCH

This study is feasible since:

- it is conducted at schools in township and farm schools in the Fezile Debi District of the Free State, which were easily accessible to the researcher;
- the extent of HIV/aids is well known and therefore the quality of information obtained from the participants was high (Strydom, 2009d:208-209);
- the researcher is working as a School Principal with the Free State Department of Basic education which ensured accessibility, cooperation, confidence (Fouché, 2009b:272) and the opportunity for the researcher to spend considerable time in the natural setting, gathering information (Creswell, 2009:178);
- literature resources for gathering information were sufficiently available; and
- the research was not too costly nor time-consuming.

1.10 POSSIBLE LIMITATIONS/CHALLENGES OF THE RESEARCH

The overall theme of this study, namely HIV/aids *per se*; posed a challenge as it is a subject people are extremely sensitive (*cf.* 1.1) about. The human element, which consists of complex human beings, who are actively selecting the elements to which they want to respond, also presented a challenge. As a non-notifiable disease HIV/aids also poses specific challenges to school governance as no-one is aware of its occurrence rate.

As the researcher was ethically responsible for protecting the rights of the participants while conducting the research (McMillan & Schumacher, 2001:23), the participants could only be propped for answers to a limited extent. The researcher also had to ensure that the educational purposes of the schools studied were not unduly interfered with while conducting the study.

Claiming an own position in the debate regarding the contesting issue of combating this pandemic was also challenging as the findings presented were based on the perspectives of the unique sample of School Governing Body members as a changing entity (School Governing Body members are re-elected every three years).

The research methodology followed was another aspect presenting challenges and limitations. A qualitative research design to measure complex human characteristics such as leadership and school governance involve conceptual definitions and issues of validity (*cf.* 5.3) that had to be addressed.

The research was time- consuming as it took the researcher a very long time to negotiate with school principals and chairpersons of School Governing Bodies before conducting the actual interviews. The selected schools were also far apart.

1.11 ETHICAL ISSUES

In order to ensure that the findings of this research are objective, the limitations thereof and the methodological restraints that determined the validity of such findings were indicated (Mouton, 2004:240). The researcher also set out to communicate the findings in full without any misrepresentations.

Permission was, furthermore, obtained from the authorities of Fezile Dabi Education District to conduct this research in a sample of both primary and secondary schools under their jurisdiction (Creswell, 2009:177). Since all the participants participated voluntarily (Consent forms see Annexure A), their rights to privacy were respected. By informing all participants that the information obtained from them would be analysed and treated as confidential, their anonymity was also ensured (McMillan & Schumacher, 2001:421; Strydom, 2009a:61).

With regard to HIV/aids being of a very sensitive nature, the researcher took the responsibility of treating all privileged information obtained from the participants as extremely confidential, as proposed by Strydom (2009a:56). The aim of the research was conveyed to the participants prior to the observations and interviews, which, thereupon, provided informed consent to being researched (Creswell, 2009:89), although the researcher took great care in not exposing any of them to greater risks than those of everyday life (Mouton, 2004:245). The researcher also aimed at conducting this study with appropriate moral behaviour true to the ethics of science throughout (Mouton; 2009:10).

1.12 CHAPTER DIVISION

In order to address the issues pertaining to an effective governance strategy to combat the HIV/aids pandemic, the following chapters were included to present important information:

CHAPTER 1: ORIENTATION TO THE STUDY

Chapter 1 is primarily an orientation chapter, outlining a theoretical framework, presenting the problem statement and discussing the relevant research methodology in preparing the reader for the subsequent chapters.

CHAPTER 2: THE IMPACT OF THE HIV/AIDS PANDEMIC ON EDUCATION IN SOUTH AFRICA

This chapter provides information obtained through an in-depth literature study on the impact HIV/aids has on South Africa, the quality of education, education managers, educators and learners.

CHAPTER 3: ECOSYSTEMIC THEORIES

In this chapter, an ecosystemic strategy is analysed and contextualized to the South African social context. The interrelatedness of the different systems is emphasized, while the importance of understanding ecosystems and systems-thinking is highlighted.

CHAPTER 4: SCHOOL GOVERNANCE

After referring to governance in general, this chapter addresses the issue of school governance specifically. Focus is placed on school leadership and governance by addressing various questions relating to the concept of strategic school governance. As the main agent of public schools and bestowed with the function to govern schools, School Governing Bodies and their role in leading schools to deliver a high quality of education and combat the HIV/aids pandemic are discussed at length.

CHAPTER 5: EMPIRICAL RESEARCH DESIGN

In Chapter 5, the empirical research methods are discussed in detail and motivated. The interpretive paradigm is explained, the research design is defined and the mode of inquiry is outlined. Moreover, the data collection and analysis strategies are provided. This chapter also identifies the research population and explains how the participants were selected, using a purposive sampling strategy.

Important aspects regarding quality assurance such as the credibility and trustworthiness of the findings are also addressed.

CHAPTER 6: DATA ANALYSIS AND INTERPRETATION

Chapter 6 yields the analysis and interpretation of the data collected through the unstructured interviews held with School Governing Body members, observations made during the course of the fieldwork and analysis made of existing HIV/aids policies.

CHAPTER 7: THE RESEARCHER'S VIEW OF AN ECOSYSTEMIC GOVERNANCE STRATEGY

In recommending an ecosystemic strategy to govern schools challenged by the HIV/aids pandemic effectively, this chapter demonstrates the importance of taking cognisance of, *inter alia*, the interrelatedness of different ecosystems when governing schools amidst social problems such as HIV/aids and outlines how systems-thinking can empower school governors to compile HIV/aids policies for schools.

CHAPTER 8: SUMMATION, FINDINGS AND RECOMMENDATIONS

This chapter comprises of a summary of the previous chapters, followed by specific findings that have become clear from following a qualitative research design. Recommendations are also provided, aimed at suggesting an ecosystemic strategic school governance strategy with the potential of contributing to combating the HIV/aids pandemic effectively at South African schools.

1.13 CONCLUSION

Statistics show that HIV/aids is a pandemic that is escalating. This can be attributed to, *inter alia*, urbanisation, poverty, diverse backgrounds, substance abuse, limited future opportunities, illiteracy, ignorance, carelessness, vulnerability, moral looseness and a lack of knowledge. Whatever the reasons, this pandemic is having a negative effect on the provision of quality education to all as it gives rise to educators and learners experiencing physical, mental, medical and psychological problems. These, in turn lead to, among others, high rates of absenteeism, dropouts, inefficiency, unproductiveness and poor interpersonal relationships directly influencing teaching and learning as well as the general functioning of schools.

HIV/aids has been acknowledged as a social problem that negatively affects human's total ecological system, thus clouding South Africans' future life expectations. Since schools are one, if not the most important subsystems in which the youth develop, it is essential to gain insight into the ability of School Governing Bodies to govern schools effectively in order to create safe and secure learning environments. The different systems in which humans develop are, however, interrelated and

independent upon each other. As such, the presence of HIV/aids in any one or more of these systems presents challenges to school governors.

CHAPTER 2

THE IMPACT OF THE HIV/AIDS PANDEMIC ON EDUCATION IN SOUTH AFRICA

2.1 INTRODUCTION

While Chapter 1 validated the research problem and provided an overall orientation to the study, this chapter presents information obtained through an in-depth literature study on the impact of HIV/aids on education in general and on educators and learners specifically.

Focus is, firstly, placed on the impact of HIV/aids on South Africa at large and, then on HIV/aids leading to a decrease in the supply and quality of education with specific reference to educator absenteeism. The impact of this pandemic on education managers, educators and learners with regard to school enrolment, school attendance and dropout from schools are also highlighted.

2.2 HIV/AIDS IN SOUTH AFRICA

South Africa has, in the past decade, experienced an exponential growth in the prevalence of HIV infections (Pengpid *et al.*, 2008:48; *c.f.* 1.2), leaving the equal provision of quality education to all learners facing serious obstacles (Prinsloo, 2004:81; *cf.* 1.3).

The increase in frequency among the youth is, according to various authors (Van Wyk *et al.*, 2007:341; Amoakoh-Coleman, 2006:971; Wallman, 2000:189), caused by, *inter alia*, their temptation to discover their sexual identities through not only experimenting with sex, but also with alcohol, tobacco and drugs, which leads to immorality and loose sexual behaviour which, in turn, may contribute to an increase in sexually transmitted infections, unwanted pregnancies and HIV/aids (Bana *et al.*, 2009:154&158). Factors such as unplanned urbanization (*cf.* 3.3.1.7), a culture of poverty (*cf.* 2.2 & 2.5), inequality, a lack of opportunities, social problems and exposure to conflicting ideas about sexual values and behaviour due to divergent belief systems enshrined in the varied social, cultural, racial, educational and religious backgrounds of South Africa's population, are added by Prinsloo (2004:68),

Frank *et al.* (2008:397), Francis and Rimmensberger (2008:603) as well as Pengpid *et al.* (2008:50).

The magnitude of this severe pandemic or devastating health condition as referred to by Mubangizi (2005:134) is, as pointed out by Van Wyk and Lemmer (2007:302), enormous and the effects of HIV/aids-related deaths are felt by families, communities and schools. Recognition of this unfolding tragedy has, however, been slow to gain momentum. Reasons for the latter are, according to Hall (2003:34), due to denial (*cf.* 1.1) at a personal and community level, the stigma (*cf.* 1.1) attached thereto - preventing many to seek treatment (Louw *et al.*, 2009:212) or discussing it with others (Francis & Rimmensberger, 2008:604) because of being afraid of their HIV status becoming known - and the confused approach taken by the State.

The death of young educators especially 24 - 25 years old; (Louw *et al.*, 2009:212), due to HIV/aids has increased by more than 40% in the past years (Govender, 2001:1; *cf.* 1.1). Since the teaching profession is in a crisis due to the latter (*cf.* 1.1), Lorgat, media officer of the South African Teacher Union (cited by Govender, 2001:1), emphasizes the importance of educators becoming open about their HIV/aids status. Visser (2007:679), in support, opines that the total eradication of the intergenerational secrecy despite the right to privacy (section 14 of the Constitution) surrounding HIV/aids is imperative in order to keep uninfected people uninfected. Research conducted by Frumence *et al.* (2010:10) similarly shows that an increased openness has already successfully decreased the stigma previously associated with the disease in Tanzania.

With reference to the concealment of HIV/aids status, Van Wyk and Lemmer (2007:306) contend that parents, keeping their own and their children's HIV/aids status a secret, inhibit the realization of an effective partnership (*cf.* 3.6, 4.3.1) between parents and schools. The reason for this being that a thorough understanding of the school community is an essential first step in establishing effective partnerships between schools and families.

In order to provide learners with the opportunity to speak about their HIV-status and/or sexual activities, Naidu *et al.* (2008:140) suggest that schools obtain health nurses to visit schools and to provide academic progress reports of learners

undergoing treatment. Research conducted by Bana *et al.* (2009:155) in this regard shows that by far the majority of learners (88%) have learnt about sex-related issues from health-care workers, nurses, doctors, clinics and educators and are more comfortable discussing such issues with them than with their parents. The latter occurs, despite the fact that the South African youth feel that their parents ought to be the most influential source of sex education predisposed to them (Pengpid *et al.*, 2008:50).

Regarding the HIV/aids mortality of educators, who work in a person-intensive industry, Kelly (2001:2; *cf.* 1.1) points out that HIV/aids education to all citizens – from learners to senior citizens (Dekker & Lemmer, 1993:211) - demands a change in recent educational methods. Coombe (2002a:vii; *cf.* 1.1), similarly, posits that schools in an aids-infected world cannot be the same as those in an aids-free world. Accordingly, a former Minister of Education, Kader Asmal declared HIV/aids an educational priority while his advisor, Kgobati Magome, stressed the necessity to provide support for infected educators (Conference on HIV/aids and the Education Sector:55) It is, however, not only infected educators that need support. Louw *et al.* (2009:205) also stress the necessity of supporting educators in general to cope with HIV/aids at work and in their communities. Rossouw (2010:55), concomitantly, contends that recent strikes by educators were not so much on attaining higher salaries, but rather because of their concern about the lack of action from the State to curb those elements at schools that regularly impact on their security.

According to Hernes (2002:118), the rapid spread of HIV/aids over the past decade in countries south of the Sahara is no longer just a health problem, but a major cause for an ongoing development crisis. Seeing that education is one of the many sectors that are being devastated by the spreading of this pandemic, the same author opines that these countries' human resource infrastructure will, in the absence of appropriate responses in the education sector, be destroyed by the HIV/aids pandemic, leading to a continuous decline of their economic output. Vergnani and Schaay (2001:223), alongside, refer to HIV/aids as a disease with socio-economic and human rights implications. In line herewith, Thurman (2000:6) points out that aids is not just a health issue; but also a fundamental development, economic, security and stability issue. With the latter in mind, the South Africa's

National Policy on HIV/aids (SA, 1999) aims at minimizing the social, economic and developmental consequences of HIV/aids for learners, educators and the education system alike.

As pointed out by Moran (2004:9), HIV/aids are, conversely, continuing to cause fundamental social and economic changes in future that will affect educational opportunities as well as the demand for labour. The same author indicates that HIV/aids does, however, not befall the population equally. Recent years have shown that women and young people are disproportionately affected. Worldwide, some 50 per cent of all new HIV cases occur in youth between the age of 15 and 24 years (*cf.* 1.1). This poses a severe threat to the whole of society as young people, who may have some productive years living with the HIV infection, sooner or later develop AIDS and become dependent on care from family members (*cf.* 1.2).

HIV/aids thus affects people in their most productive years, severely disrupting the economic and social base of families and societies (Carr-Hill, 2005:135; Moran, 2004:10). The latter demonstrates the existence of a vicious circle between deprived living conditions and poor education resulting in further poverty (*cf.* 1.1), thus providing a vivid example of how the ecosystemic theory could be manifested in a practical way (Pillay & Wasielewski, 2007:14; *cf.* 3.2).

Although the social costs of the epidemic will continue to rise, Carr-Hill (2005:34) cautions that the costs to the economy due to absenteeism and reduced productivity may be higher than the costs of eventual deaths. De Waal (2003:7), concurrently, shows that HIV frequency rates of 10 percent entails a decrease in economic growth of 0,4 percent. HIV/aids will significantly slow the growth of the labour force and will create labour shortages in several sectors, including that of education. With reference to the latter, Van Wyk and Lemmer (2007:303) show that deaths among educators and student educators impact both the supply and the demand for educators.

The loss of women`s labour in the home and in agriculture will, moreover, create critical deficits in food supplies. The pandemic will continue to have a profound impact on families and communities, on the availability of social services, access to health services and the rate of poverty at the household level. Children will be the

most affected since they will be required to take the place of adults in the labour market, particularly in households that are dependent on subsistence farming (Pillay & Wasielewski, 2007:14).

In foreseeing the risks of the negative impact of HIV/aids on education, the International Institute for Educational Planning organized an international seminar on the theme in 1993. The Report (UNESCO, 1993) flowing from this seminar, which was widely circulated, emphasized the need for planners and education managers to have a better understanding (*cf.* 1.1) and assessment of the impact of HIV/aids on education in order for them to design new practical methods for delivering educational services that cater for HIV/aids-affected learners and educators and assist in preventing new infections. The Report also strongly stressed the necessity for donor agencies and governments to coordinate their activities in order to include HIV/aids prevention activities in all their development policy strategies (*cf.* 1.1 & 4.7). In this regard, Barry (2006:158) shows that universal precautions – standard infection-control procedures or measures to prevent contact with blood or bloody fluids – should be adhered to under all circumstances. In October 2000, the Institute organized another seminar on HIV/aids and education. The deliberations during this seminar, unfortunately, indicated that the situation has worsened at a rate much faster than had been predicted in the early 1990s (UNESCO, 2000).

2.3 HIV/AIDS: DECREASING THE SUPPLY OF EDUCATION

HIV/aids is decreasing the supply of education (Badcock-Walters & Wilson, 2006). In support, Rossouw (2010:164; *cf.* 1.1) contends that HIV/aids sooner or later leads to the incapacity of an educator as a result of ill health. *Incapacity*, in line with the Employment of Educators Act 76 of 1998: section 11(1)(d)), entails that an educator is *unfit for the duties attached to the educator's post or incapable of carrying out those duties efficiently*.

Basson *et al.* (2005:214) concurrently state that an employee who has become too ill to work may be dismissed based on such incapacity. It may, moreover, be necessary to remove educators and learners who pose a medical predictable momentous health risk to others from the system (Barry, 2006:219). By referring to statistics on the prevalence of HIV/aids, Venter and Levy (2009:32) voice their concern over the

dire consequences of this pandemic on South Africa's labour market in future as productivity continue to decline due to deaths, associated stigma and de-motivated employees who suffer the loss of colleagues and friends.

With reference to the stigma surrounding HIV/aids, Swanepoel *et al.* (2007:74) state that, journalists are largely to blame as they created the perception that a life with HIV/aids is synonymous with death, thus perpetuating the stigma surrounding this syndrome. It is, however, equally true that there is no cure for HIV infection at present, and that any cure that may be discovered may very well be unaffordable for most South Africans (Barry, 2006:216).

On the supply side, many governments are faced with the problem of providing the resources necessary for the education process to take place. Curtis (2004:52) adds that HIV/aids provide society-wide challenges that need to be addressed effectively. Such resources range from human (*i.e.* educators, management and parents) to material objects (*i.e.* reading and writing materials), the payment of fees and other related costs. In this regard, Cloete (2004:621) endorses the importance of having the sufficient financial means to deliver sustainable education together with governments' capacity to deliver educational services.

The supply of education does, however, not only depend on the availability of educators and teaching-learning materials at schools, but also on the capability of education systems to manage the whole education sector (Carr-Hill, 2005:40). Schools with enrolment figures below a certain minimum may be closed and the remaining learners moved to other schools. The mere presence of school buildings without willing and solvent parents to send their children to school amounts to a failure on the part of the government to provide sound education.

Changes in the numbers of trained educators, provision of teaching learning materials, school buildings and management as indicators of the supply of education on the part of the governments are insufficient, because they do not realize that what is happening is the direct result of AIDS (Louw *et al.*, 2009:206; Bennell, 2005:445). These pointers must, according to Carr-Hill (2005:40), be arranged with caution so that all can be reminded of the closely linked and intertwined factors that obstruct the supply of education in developing countries specifically.

Moreover, if there are fewer learners in the education system and a lower demand occurs for places in education programmes, the supply of facilities and institutions also decreases. Solutions such as the introduction of multi-grade teaching might tax the current capacity of affected school systems which are unprepared for new responses to the solution (Bennell, 2006).

The supply of education will also be affected by financial issues. As learner enrolment declines, so will the number of financial supporters. Contributions made by such supporters are essential for attaining items such as chalk and books, for maintaining school buildings and allowing for supplementary allowances to educators. Crouch and Lewin (2003:261) caution that people investing in education will in future probably be fewer than anticipated.

2.4 HIV/AIDS: DECREASING THE MANAGEMENT AND QUALITY OF EDUCATION

According to Hernes (2002:118; *cf.* 1.1 & 2.4), the quality of education in general will be affected by several confounding factors which will emerge as the HIV/aids pandemic takes a deeper hold in countries within the Eastern and Southern Africa Region. This is, as set forward by Cloete (2007:391), that sustainable governance includes the delivery of the required quantity of education at the expected level of quality over an extended period. The delivery of education is, however, hampered by HIV/aids as education systems in this region have already begun to experience increased problems of educator absenteeism (*cf.* 1.1), loss of inspectors, educators, education officers; as well as planning and management personnel (Hernes, 2002:118). As trained and experienced educators are replaced with younger and less trained educators, the same author cautions that a less qualified teaching force will emerge. It is quite apparent, as pointed out by Hernes (2002:120), that if HIV/aids continues to take its toll, schools will increasingly be left without headmasters and school inspectors. This, in turn, has a negative impact on an education system's ability to plan, manage and implement sufficient education policies and programmes.

In this regard, Pengpid *et al.* (2008:49; *cf.* 1.1) maintain that; although 13 609 educators were trained in HIV/aids, life skills and presentation skills for the

implementation of HIV/aids education at schools in 1998, educators report that they do not have the time nor the support (*cf.* 3.3.1.4. & 4.7.1) in terms of resources from other staff members and principals to practise their skills. Vergnani and Schaay (2001:227), accordingly, criticize the Code of Good Practice: Key Aspects of HIV/AIDS and Employment as not emphasizing the crucial role of local aids service organizations, non-governmental organizations and community-based organizations sufficiently.

Schools themselves may also be affected by psychological effects due to having infections, illnesses and deaths in their midst (Carr-Hill, 2005:45; *cf.* 1.1). According to Kataro (cited by Mahal, 2007:54); it is likely that discrimination (*cf.* 1.1), exclusion and isolation will occur in classrooms and schools as those infected or ill are treated differently from others. The latter is a reality despite section 9 of the Constitution of the Republic of South Africa (Act 108 of 1996) prohibiting any form of direct or indirect discrimination and many authors emphasizing the fact that HIV positive and aids sufferers may not be subjected to any form of victimization and discrimination (Rossouw, 2010:163; Barry, 2006:153&222). Educators and learners with HIV/aids may, however; be further disadvantaged. Educators may, for instance, face the suspension of social and health benefits and/or dismissal from the system. Learners, on the other hand, may face formal suspension by the system or be pressured to leave school if they have not already dropped out (Carr-Hill, 2005:45).

Overall, educators do not experience their workplaces as being conducive to their well-being in order for them to deliver education of high quality (Rossouw, 2010:80; *cf.* 3.3.1.2). An empirical study conducted by Rutherford (2009:189; *cf.* 1.1 & 5.2) in this regard, showed indisputably that educators are not protected from psychological insecurities in their work environment; leaving them stressed and considering leaving the profession.

From a learner perspective, Nieuwenhuis (2005:193: *cf.* 1.1) points out that a overcrowded, inadequately resourced and poorly managed school is clearly not in any position to provide quality education.

2.4.1 Education managers

Personnel in the management of educational institutions are not immune from both the direct and indirect effects of HIV/aids. Death cases have been reported at all levels of education management. As in other areas, it is difficult to state with certainty the cause of these deaths. Education Managers at different levels of education are in the same situation as educators as they have to attend to their relatives who have suffered or are suffering because of HIV/aids.

As indicated by Katahoire (1998:46), the impact on individual families experiencing loss and/or have to attend to an aids patient, sooner or later transcends the family borders to the workplace. Absenteeism implies loss in terms of man-hours (*cf.* 1.1) if employees have to remain absent from duty. This also has implications on the services rendered to learners at schools.

Demand and supply changes in education will, as pointed out by Carr-Hill (2005:39; *cf.* 1.1 & 3.3.1.4), unmistakably lead to changes occurring in the whole educational process. The education process will change in terms of time devoted to teaching and learning, to the availability of materials and funds to provide support services to learners experiencing a wide range of barriers to learning (Pillay & Wasielewski, 2007:19). Aids, therefore, complicates the entire education process in several ways. These can best be understood in terms of the quality and quantity of education.

While changes may take place that hamper the overall quality and quantity of education, the system may, as enlightened by Carr-Hill (2005:40), also suffer in terms of efficiency and effectiveness.

2.4.2 Educators

Serfontein (2005:207) points out that the link between quality education and the professional ability of educators is endorsed by a number of sources. Bray (2005:135), for instance, emphasizes that educators' personal conduct and example play as important a role as their teaching. With reference to the examples educators present to learners, Vergnani and Schaay (2009:224) indicate that educators also bear the responsibility for other tasks related to HIV/aids, such as providing role models for best practices in education. In addition, recent research results (Grösser,

2007:37; Ngidi & Qwabe, 2006:537) provide convincing evidence that educator quality plays a critical role in whether and how much learners are learning (Van Rooyen & Rossouw, 2007:25; *cf.* 1.1).

A decline in the number and availability of educators is, however, illustrated through case studies of reports from Inspectorates in Central African countries (Carr-Hill, 2005:43; *cf.* 1.1). Experiences gained through these studies demonstrate the feasibility of tracking the spread of aids through the teaching corps by examining flows out of the system (the length of absence owing to illness). It was, in contrast, found that it is practically impossible to obtain early warnings regarding the spread of the pandemic by examining medical records.

Research conducted by Armour-Thomas *et al.* (1989:76) reveals that what educators know and are able to do is one of the most significant determinants of what learners learn. Their study, for example, found that educator qualification accounted for more than 90% of the variation in learner achievement with regard to mathematics and reading across all grades. Despite the important role educators have to play, various studies show that educators feel that they lack expertise and ability to meet the diverse needs of learners fully (*cf.* 1.1) and that they therefore desperately need outside guidance and support (Pillay & Wasielewski, 2007:15; *cf.* 1.1). Hence the loss of most qualified and experienced educators represent a serious threat to the quality of education (Armour-Thomas *et al.*, 1989:95).

Despite the close link between educators' capacity and quality education, Rutherford's (2009:189; *cf.* 4.4) research results indicated a lack of support Education Departments are prepared to provide to educators, leaving educators frustrated and highly stressed.

2.4.2.1 Educator absenteeism

People living with aids are often periodically ill. When educators are absent due to illness or medical treatment, learners are often left without schooling due to a shortage of educator replacements (*cf.* 1.1). In some instances, absenteeism occurs so frequently that education offices choose to dismiss such educators in an attempt to secure stable schooling for learners (Rossouw, 2010:152). If educators are dismissed, immediate replacements are necessary to cater for the educational needs

of learners. When an educator dies from aids, he/she is seldom replaced immediately due to cumbersome administrative structures and general educator shortage (Carr-Hill, 2005:29-30). To Maree (2008:69), absenteeism is both a symptom of disorder in schools and a cause of further disorder as it has a negative effect on the education of learners and promotes an irresponsible attitude as educator absenteeism is usually exploited by learners.

In this regard, Carr-Hill (2005:30) points out that the latter will diminish learners' returns from/to schooling and reduce the quality of education. The reduction of quality will, in a longer-term perspective, reduce parents' willingness to enrol their children at schools since they will not see any advantage in spending their hard-earned money and valuable time on low-quality schooling. Under such circumstances it could be more beneficial to keep their children at home where they can work and even add to the family's income (Carr-Hill, 2005:30).

Schoeman (2004) opines that it is unfortunate that education authorities expect educators to accommodate 40 or more learners per class. Overcrowded classrooms (*cf.* 2.4), filled with learners with diverse levels (*cf.* 2.4.2) of academic ability and learners with physical, mental, medical and/or psychological problems, as stressed by Alston (2006), are a nightmare for educators and a place where learners get *lost*. This is even more true if taking into consideration that learners living with HIV require specialized support and care which amplifies the burden on educators requiring of them not only to teach, but also to possess sufficient knowledge on how to meet such needs (Louw *et al.*, 2009:213) in an attempt to remove all barriers to inclusion and the healthy functioning of all learners (Pillay & Wasielewski, 2007:3; *cf.* 4.3.1).

Consequently, classrooms are altered into places where learners receive reduced attention and meagre assistance and make poor progress - not because educators want this to happen, but because they just cannot cope (*cf.* 2.4). Underscoring the latter, Mestry (2006:27) explicates that deficient and overcrowded classrooms (one of the main determinants of quality education) have obscured the way for effective teaching and learning by creating impossible working conditions (*cf.* 4.4).

Because of the fact that educator absenteeism leads to the increase in the workload of other educators (*cf.* 1.2, 3.3.1.4 & 3.3.1.7), the burdened educators could easily

become antagonistic towards their colleagues` having to stay home because of ill health. This could seriously hamper collegial educator behaviour that should, idealistically, comprise of open and professional interaction between educators who enjoy working together, are proud of their work and support one another (Pretorius & De Villiers, 2009:35). Disengaged educator behaviour, to the contrary, leads to a lack of meaning and focus in professional activities from which negative, intolerant and critical behaviour towards one another and education in general can flow.

2.4.3 Number of educators

According to Mahal (2007:61), the number of educators available for posts is influenced by many factors, including the capacity to train educators, the retention of educators in classrooms and the maintaining of healthy working conditions for those already in the field. Educators, like many others, are not spared by HIV/aids and subsequently death and inability to carry out their work sufficiently thanks to stress and chronic illness occur (Nelson Mandela/HSRC Study of HIV/AIDS, 2002). Even if school facilities continue to be available, a lack of educators and other personnel to provide teaching services will hamper education. It is clear that the number of trained educators is decreasing (Mahal, 2007:61). The shortage of educators is regarded by Maree (2008:67) as one of the major reasons for rendering schools dysfunctional. Educators who are infected may attempt to be transferred to another area or, once visibly ill, abscond and disappear.

Another aspect that may interfere with educators` performance is their commitment to their extended family members. In communities where the extended family system is still practised, educators may find it difficult to avoid activities that involve their respective family members. If educators are expected to attend relatives in critical conditions, it may take up valuable time which will result in their neglecting school activities. Depending on the duration of time a patient takes before death (sometimes extending to a year), the school curricula will thus also suffer.

Funeral ceremonies for colleagues, family or community members are yet another dimension which claims educators` time and lead to absenteeism and depression (Louw *et al.*, 2009:205). This may be more serious if the rate of deaths as a result of AIDS increases. In one community the number of deaths due to aids accounted for

56% (Tibaijuka, 1997:963-964). The frequency of death can be as high as two within one week. If this is converted into man-hours over a period of time, the impact on education is immense; given the number of educators involved (*cf.* 1.1).

In view of the fact that the education profession is still characterized as being a dominant female profession, gender-based discrimination at schools also merits attention. Vergnani and Schaay (2001:227) opine that women face particular risks in relation to HIV/aids because of their femininity and of their role as caregivers in families. As such, school should commit themselves to eradicate any form of gender-based discrimination and/or violence within school environments

2.4.4 The qualitative impact of HIV/aids on educators

The qualitative effects of HIV/aids on educators are clear. Makuka and Kalikiti (1995:47) report on HIV/aids-related cases and deaths among educators who have, thus far, had various perceived negative consequences. Research done by these authors indicates that educators have become over-concerned about their health, leading to nervousness and depression.

This study showed that educators are frequently absent from work and become unable to perform their duties efficiently. Due to the latter, educators' attitudes towards their work deteriorate, which in turn has a negative physiological impact on the learners (*cf.* 1.1). An average of four education hours was found to be lost per week in urban areas in 1995. The research results of Makuka and Kalikiti (1995:47) also revealed combined morbidity and mortality rates representing a 25% increase in public expenditure in an attempt to maintain recruitment and staffing at current levels.

In line with previous findings, Moran (2004:10) points out that the losses of educators due to HIV/aids between 2000 and 2010 are estimated annually at 2.1% which are progressively very extensive losses. Zero-positive educators, on the other hand, are bound to lose their confidence and, not surprisingly, become unmotivated (Carr-Hill, 2005:48; *cf.* 1.1 & 3.3.1.3). Discrimination against such educators and learners further worsens the situation as it prevents disclosure which is psychologically and medically problematic (Barry, 2006:221). It also has obvious cost implications (*cf.* 1.1).

To combat the decrease in quality education, Vrgnani and Schaay (2001:226) urge all managers to instil a workplace HIV/aids programme guided by the needs and capacity of a specific workplace. The latter implies that such a programme be set up to match the allocation of appropriate resources (both in terms of finances and human resources). In elaborating on this idea, the same authors (2009:227) stress the importance of companies (schools) to engage with and take responsibility for HIV pandemic.

With reference to HIV/aids education as a remedial intervention, Dekker and Lemmer (1993:211; *cf.* 2.2), propose that it should be informative without stimulating risky sexual activity in young people, while Amoakoh-Coleman (2006:972) points out that it should be multi-dimensional, using a holistic approach. Making information accessible to learners is thus still needed. In effect, education and a positive change in behavioural attitude (*cf.* 2.4.4) are the keys to overturning the progressive spread of the HIV/aids threat, especially among the youth (Van Wyk *et al.*, 2007:343). It is, however, pertinent to note that knowledge about HIV/aids with the wrong attitudinal behaviour may be worthless. In recognizing that human beings are inherently resistant to change, Welman (2010:17) argues that even if it is noted that long held behaviour is dysfunctional or could potentially disadvantage them, humans struggle to make significant shifts in the way they reason and act. Swanepoel *et al.* (2007:75), moreover, opine that the media have struggled to develop a positive attitude towards the pandemic since its onset.

2.5 THE IMPACT OF THE HIV/AIDS PANDEMIC ON LEARNERS

Children living in an HIV/aids-affected family, according to Louw (2008:220), often live in an atmosphere of parental depression, unpredictability and erratic behaviour. This is due to the fact that an infected parent may take refuge in isolation and secrecy, as well as becoming insecure or anxious in his/her attachment with their children. Such children are open to experiencing a lowered sense of self-worth because of being rejected, psychosocial problems (*cf.* 1.2 & 4.3.1) because of alienation, increased depression because of their vulnerability, and difficulties in keeping up at schools.

Since many learners live in communities that, apart from socio-economic restrictions (*cf.* 1.1), are plagued by the difficulties that come with single parents, learners without adults in the family and with problems brought about by the HIV/aids pandemic, come to school with a baggage of social, physical and emotional problems that prevent them from achieving success at school (Naidu *et al.*, 2008:133). Some may, as pointed out by Louw (2008:220), even opt for oppositional and disruptive behaviour to resolve their emotions and fears.

Louw (2008:220) indicates that early childhood education and higher education also suffer because of the HIV/aids impact on the educational demand. In the absence of mothers who died of aids, the necessity for early childhood education increases as traditional child carers are required for more productive labour on farms. The same author (*cf.* 1.1) also points out, that learners, who were not nurtured in their earlier life, often resort to sex in order to secure some sort of nurturing later in life. Since their inner controls have not been established, they become rebellious and may practise poor hygiene and avoidance behaviours or develop dependencies on others, sex or substances (Van Dyk, 2003:277).

Such children may, on the other hand, also be withdrawn from schools to take care of households or due to a lack of financial means. In this regard, Smart *et al.* (2001:93) caution that children may perceive themselves as an undue liability for parents and, consequently, show socialization problems. Under these circumstances, children are particularly disempowered and, consequently, vulnerable to the lethal context of poverty and HIV/aids. Their worlds are so narrowed down by poverty, a lack of education, positive support networks and coping skills as well as positive role models, that their sense of power and agency to take control of their own lives are sapped away (Francis & Rimmensberger, 2008:611; *cf.* 1.1).

With reference to orphaned children living in child-headed households, Louw (2008:222; *cf.* 1.1) shows that they are more likely to suffer from hunger and living without the necessary clothing and medical care in housing of a poor quality. As a result, they are deeply humiliated by having to beg for food or money and by being ridiculed by co-learners for their inadequate school uniforms (Nelson Mandela Children's Fund Report, 2006:13).

Due to losing a parent as provider, caregiver and nurturer, these children also appear to be the victims of cultural deprivation which leads to their lacking knowledge of basic cultural norms and values to base their future decisions upon (Louw, 2008:222). The latter places more emphasis on the duty of schools to prepare learners for adulthood and a life of responsible decision-making (Dekker & Lemmer, 1993:213; *cf.* 1.1). Cloete (2007:402), in support, stresses that a person's quality of life depends, not only on his/her level of education, but also on his/her own internal perceptions of his/her life.

The need to make a costly investment in children, feared to have been infected by the HIV virus, is curtailed by the fact that some family members regard education as a waste of limited family resources. Bertozzi (1991:37) opines that instabilities within families and communities due to the migration of widows and orphanhood, as well as the early marriages of young (school) girls, have been shown to affect the demand for education negatively. Many subsequent studies have shown that these reasons have continued to affect the need for education in many different ways.

While the demand for education would be expected to rise in order to cater for children whose parents are bed-ridden or have died of aids, the cost involved has proven to be beyond the capacities of many families. This is true for higher education where more trained people would be required to fill in the gaps left due to massive deaths of learners and their educators (Carr-Hill, 2005:36).

2.5.1 School enrolment

Studies done both pre-and post- 1995 on the impact of aids on education, as outlined by Quinlan and Willan (2005:241), show a strong relationship between school enrolment and HIV/aids, suggesting that school enrolment in aids-affected areas declined as a consequence of the pandemic (*cf.* 1.1). Katahoire (2008:37) suggests that HIV/aids may reduce the number of primary-school children by 22% and secondary-school by 14% as a result of increased infant and child mortality, as well as lower attendance in future.

During the years 2001 to 2006, to the contrary, an upward trend in learner numbers has occurred due to a higher population density which translates into fewer schools with more learners and, thus, much higher educator-learner ratios (Maree, 2008:67).

2.5.2 School attendance

Poor school attendance has been associated with the declining financial capacity for the aids-affected households to meet the school-related costs or by periods of children staying home to assist sick parents (Louw, 2008:224). Tibajuka (1997:968) indicates that most family resources are saved in order to cater for sick persons/members. The medical costs for aids-related diseases have been observed to be high and unaffordable to many families in the developing world. Smart *et al.* (2001:93), in this regard, point out that HIV/aids affects poor households dramatically by increasing the burden on an already overburdened home, while Mubangizi (2005:140) shows that it is aggravating poverty by infringing on everyone's right to social security.

The tendency has been to withdraw from other family expenditure, including education, to take care of the medical costs. Consequently, school-going children are forced to engage in casual labour as a way to assist their families in food supply and other needs which, in many ways, affect school attendance (Mahal, 2007:64). Supportive of the latter, Griesel-Roux (2004:42) states that girls are mostly affected as they are required to run the household cook and see to the well-being of their younger siblings. Such children are cast into roles for which they are not ready or mature enough. Poor school attendance, in turn, inevitably leads to poor academic performance, failure and an overall loss of quality of life (Maree, 2008:68).

2.5.3 Dropouts from schools

Sumra (1995:9) makes it clear that children who lose their parent(s) are more likely to abandon school because of failure to meet the costs of schooling. General poverty levels and cultural factors still play significant roles in some districts as causes of high drop-out rates (Sumra, 1995:9).

It can be argued that, while poor economic performance in many countries cannot be attributed fully to the impact of aids, it appears that this impact correlates highly with declining patterns in the education sector (Carr-Hill, 2005:39). Bachmann and Booysen (2003:17), similarly, show that the physical, logistic and economic burdens brought along by HIV/aids-related illnesses cannot be ignored as they affect the health and wealth of individuals within their entire ecosystems, whilst aggravating

pre-existing poverty. In this regard, Demmer (2004:314) shows that children, having to deal with the death of a parent due to HIV/aids, are also at risk of prolonged grief and psychiatric problems which may cause them to withdraw from school activities altogether.

Prinsloo (2004:68), moreover, indicates that education in poverty-stricken areas is hampered by a lack of order and intellectual stimulation which leads to negative academic self-concepts, low levels of motivation and cumulative academic disadvantages, contributing to failure at school and early drop-out.

Children still enrolled at schools, also encounter other problems. As they return to schools, after taking care of a parent, they are faced with problems such as exceeding the age limit for their class groups, losing their original school friends and stripping them of peer group support, which in turn causes them rather to drop out of schools (Louw, 2008:224-225). As schools are one of the most important socializing agents in society, dropping out from schools deprives adolescents from developing the necessary social skills needed (Maree, 2008:69) to become the responsible future citizens South Africa so desperately needs. Instead, they wander the streets unprotected, unsupervised and uneducated, open to becoming involved in drugs, criminal behaviour and being, themselves, infected by HIV, with no prospects of employment.

2.5.4 The qualitative impact of HIV/AIDS on learners

Makuka and Kalikiti (1995:49) state that aids has led to numerous public discussions concerning the full extent of the prejudices and fears most people hold regarding illness and sexuality. Louw (2008:221) shows that a traditional mechanism for assisting orphans (*cf.* 1.1), for example, has been overwhelmed by the scale and scope of HIV/aids. In support, Levine (2001:i) stresses that communities who took care of orphans in the past have been weakened by the present expanding scale of the HIV/aids pandemic.

The political sensitivity in relation to aids may, as put forward by Swanepoel *et al.* (2007:74), have placed more emphasis on aspects such as teenage and unmarried sex, early pregnancies and expressions of sexuality. Also, as has always been the case, the issue of power lies not far behind (Carr-Hill, 2005:47). The tension within

education is sometimes used by those in authority (both senior learners and educators) to take advantage of those who are more vulnerable - girls in general and, more particularly nowadays, the growing number of orphans. With the common belief that younger people are less likely to have aids, there has been a growing pressure on them by older people to have sex (Carr-Hill, 2005:47).

Louw (2005:183) identifies the fact that orphanaged children do not experience the community and churches as supportive, are confronted by cultural values preventing them from mourning their parent's death and substitute caregivers not suited to care for traumatized children as community indicators that may increase adolescents' vulnerability in general.

It is clear that the South African youth is trapped in risky sexual behaviours which accumulate while inadequate support, protection and care are available. Absence of the latter is furthermore, as put forward by Frank *et al.* (2008:398; *cf.* 1.1), a violation of basic human rights.

2.6 CONCLUSION

The HIV/aids pandemic has tremendous negative consequences for a society. Those consequences inevitably harming South African education as they cause educator's and learner's inefficiency with regard to teaching and learning include, among others, deaths (leading to poor school attendance, orphaned learners, high dropout rates and a loss of qualified educators), loss of productivity and even incapacitating educators, increased poverty, financial burdens (substitution of ill educators, households losing their breadwinners, schools being unable to in school fees) and psychological problems such as excessive stress, nervousness, depression and low self-esteem due to, *inter alia*, discrimination and isolation.

HIV/aids can thus no longer be regarded as just being a health problem. It must rather be recognised as an ongoing fundamental developmental crisis as it leads to social and economic changes influencing all the ecological systems in which humans live and in which children need to grow up and develop. Schools, specifically must, due to this pandemic, cope with learners and educators carrying a baggage of social, financial, physical and emotional problems which, *per se*, creates barriers to teaching and learning.

In order to clarify the essence of ecosystemic theories, on which the proposed ecosystemic governance strategy proposed in this study, is based, the next chapter deals exclusively with such theories.

CHAPTER 3

ECOSYSTEMIC THEORIES

3.1 INTRODUCTION

Chapter 2 provided information obtained through an in-depth literature study on the effects of HIV/aids on South Africa as a whole, as well as on education managers, educators and learners specifically. With specific reference to educator absenteeism, a decrease in the supply of education, management and the quality of education was discussed.

Within the overall objective of this study, namely to suggest an ecosystemic governance strategy to deal concertedly with the HIV/aids pandemic, the aim of this chapter is to analyse ecosystemic theories in order to establish their usefulness. The latter is done against the backdrop of various studies conducted by, *inter alia*, Pilon (2003:1) and Steyn *et al.* (2010:184), verifying the value of the ecosystemic strategy in investigating societal issues (*cf.* 1.1) regarding the interrelation between the various systems and their relative influence.

3.2 AN ECOSYSTEMIC MODEL

Each person's ecosystem consists of a unique and complicated web of interactions and relationships as illustrated in Figure 3.1. An ecosystemic strategy, as outlined by Pilon (2003:7), recognizes the dynamic equilibrium, interconnection, interaction and reciprocity between the different dimensions of the world. Aspects of humans such as their personality, social norms and history, cultural beliefs (*cf.* 1.1), gender, quality of life, governance, democracy, community participation and poverty (*cf.* 1.1, 2.2 & 2.5) are part of this complexity. Because of the latter, Cloete (2007:289&390) emphasizes that such multi-dimensional concepts cannot be measured by single indicators, but necessitate combinations of indicators leading to *social accounting* for which an ecosystemic strategy allows. Bronfenbrenner's (1979:ix) ecosystemic strategy highlights how seemingly remote aspects of a person's environment (*cf.* 1.1 & 2.4), such as social welfare policies, as well as the reactions and expectations of a

valued friend, can effect his/her behaviour. These interactions and their effects, however, need not be rational or conscious.

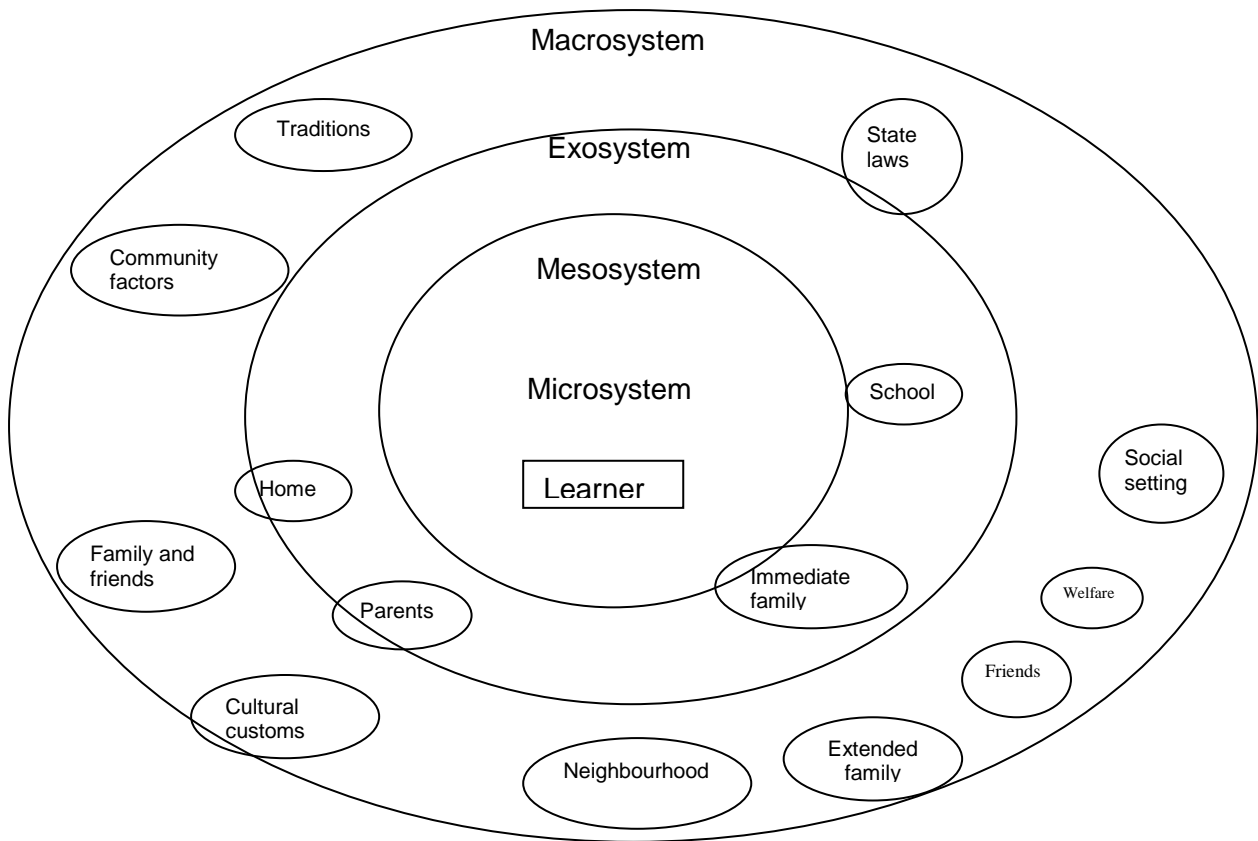


Figure 3.1: Interactions between systems

Pilon (2003:1) emphasizes that a multidisciplinary ecosystemic approach, to diagnosing problems such as HIV/aids, prohibiting humans from having a quality of life (*cf.* 1.1 & 2.5), encompasses four dimensions of being-in-the-world as donors and recipients, namely intimate, interactive, social and biophysical dimensions. Steyn *et al.* (2010:171), in support, posit that such an approach is useful as it considers factors in the immediate environment of the human being (family, school, peer group, community – different systems) and the mutual interaction between these factors. Frumence *et al.* (2010:10), moreover, stress that human behaviour as well as the factors influencing such behaviour can be understood by focusing on social structures and social interactions. An ecosystemic strategy, as pointed out by Cloete (2004:625), also has the ability to recognize how, *inter alia*, social and economic driving forces underlying human actions pressurize the ecological system, leading to long-term changes that necessitate more human intervention in response

to these pressures to redress any negative consequences for sustainable human development.

In this regard, Pilon (2003:1; *cf.* 1.1 & 2.3) points out that HIV/aids as social, cultural and environmental vulnerability must be understood and dealt with, as it induces events (deficits), hinders the coping of its consequences (undesired) and necessitates change.

As put forward by Renn and Arnold (2003:265), factors that influence an individual's sexual behaviour can be arranged in different levels of his/her ecosystem in which the individual lies at the centre. Steyn *et al.* (2010:171) explain that these different levels in the social context are viewed as systems where the functioning of the whole is totally dependent on the interaction between the various parts, and *vice versa*.

Donald *et al.* (2001:27), in addition, emphasize that any prevention strategy and health promotion programme are, by definition, holistic concepts (*cf.* 1.1) as they can only be obtained by developing people in totality. As such, Pilon (2003:5) asserts that HIV/aids-related problems cannot be solved through segmented projects which ignore micro-, meso- and macro-relationships. Cloete (2007:394), in support, opines that such projects can, at best, provide a fragmented and even distorted picture of reality. A more comprehensive, holistic and long term systemic view of the effects of HIV/aids on society, providing a synchronized coherent picture, is needed. In this regard, Pilon (2003:5; *cf.* 2.3) points out that the role of education is to help learners reflect on their particular ecosystems, and to gain knowledge and skills to cope, so that each is equipped to behave in, *inter alia*, an HIV-safe manner.

Guskey's (2000:19) conceptualization of the ecology regarding human development provides a useful theoretical framework for research on the implementation of strategic governance at schools. This author proposes that human development is influenced by factors operating at different levels within a broad ecological structure. Bender and Emslie (2010:55) also opine that the taking of a person-in-context approach to prevent multi-faceted problems allows for a more complete understanding of the development among the youth. These different levels, the micro-system (classroom practices), meso-system (professional collaboration), exo-system (organizational structure and policies) and the macro-system (cultural

values), according to the same author, exert reciprocal influence on one another. Supportive of the latter, Bronfenbrenner (2004) points out that these systems are complex *layers* of the environment structure, each having an effect on human development.

The ecosystemic perspective has emerged from a combination of ecological and systems theories. The perspective shows how individuals and groups, at different social levels, are absorbed in interdependent, dynamic and interacting relationships. Because of the latter, the whole cannot simply be torn apart in order to regard/study/treat the parts thereof in isolation (Pillay & Wasielewski, 2007:5).

Consequently, HIV/aids cannot be studied and/or treated without also taking cognisance of its effects on the mental health, education and well-being of those affected. Neither can teaching nor learning be studied without considering the emotional, social and cultural environment in which it occurs (*cf.* 1.1 & 2.4). The conceptualization of the relationships between the various components and levels of functioning of the individual human subject (intra-individual factors) and his/her environment (inter-individual and contextual factors) is required (Pillay & Wasielewski, 2007:5).

The micro-system comprises of the biological disposition and intrapersonal factors of the individual, such as close friends and family members (Renn & Arnold, 2003:262). According to Kelly (2001:66), this first system level contains the factors within a school's immediate environment which directly affect the school and, in turn, may be affected by the school. Whelan (2000:66) places the child's family at the centre of his/her eco-system and envisions the first environment, or centre circle surrounding the child, as being within the micro environment consisting of the child and the family. This initial environment involves elements which directly and concretely impact on the developing child.

Slightly removed from the individual, lies the meso-system comprising of the school and friends (Renn & Arnold, 2003:271). This system, on the other hand, encompasses the interrelations of two or more settings in which the developing person actively participates. For a child, this would incorporate the relations between home, school and neighbourhood peer group (Fullan & Hargreaves, 2000:74). The

interrelatedness of settings in this system emphasizes, as pointed out by Pengpid *et al.* (2008:49) as well as Pillay and Wasielewski (2007:19), the need for parents and the broader community to be actively involved in schooling.

The second circle or environment namely the meso-environment, consists, as avowed by Whelan (2000:66), of the school and co-learners. This second environment is conceptualized as being composed of two or more micro-systems (Brown, 1998:18).

Moving outwards, the meso-system extends into an exo-system including the wider community (Renn & Arnold, 2003:271). As such, this system consists of settings that do not involve the developing person as an active participant, but in which events occur, that affect or are affected by what is happening in the setting containing the developing person (Garmston & Bruce, 1999:33). This third environment, as set out by Whelan (2000:66), is called the exo-environment, which consists of larger institutions such as the workplace and social networks that indirectly impact the child.

The last system, namely the macro-system, envelops the micro-, meso-, and exo-systems and encompasses factors such as culture and State welfare (Renn & Arnold, 2003:272). The macro-system, as referred to by Ladson-Billings (1999:65), is made up by a surrounding socio-cultural context and therefore includes, as set forth by Steyn *et al.* (2010:171; *cf.* 1.1), the attitudes, beliefs, values and ideologies inherent in a community and culture (fundamental character of a society) and, consequently, has a pertinent impact on the other systems. Kelly (2001:760) defines the macro-system as *consistencies in the form and content of lower-order systems that exist at the level of the subculture or the culture as a whole, along with any belief system or ideology underlying such consistencies*. Becta (2001:25) and Leask (2001:37), however, argue that all settings at each level operate within a specific cultural context; while Pilon (2003:4) stresses that microcosmic *bodies* exist continuously with and are permeated by the macrocosmic environment.

To the above systems, Cushman (1996:65) adds another layer, namely the chrono-system as an outer circle, which consists of the life transitions or changes that are visited upon the child or family. Comber (2002:98) expands this concept further in

terms of another environmental layer that would consist of different world views or cultural systems (Berends *et al.*, 2002a:29).

3.3 UNDERSTANDING ECOSYSTEMS

Steinberg *et al.* (1998:15) posit that the cornerstone of the effect of the HIV/aids pandemic on education is the parallel between ecological communities (ecosystem) and learning communities (school). To understand the theory of ecosystems and apply it to human communities, Smoker and Results (1999:56) point out that officials of the Department of Education need to learn the principle of ecology, which is the *language of nature*. In support, Burke (1999:23), Davies and Ellison (1999:14), as well as Sparks and Hirsh (1999:18) opine that such officials need to become ecologically literate. Only once they truly understand the principles of ecology or the principle of community - which in this research is highlighted as interdependence, diversity, partnership, energy flow, flexibility, cycles, co-evolution, and sustainability - these principles of ecology can, as pointed out by Fullan (1998:10), be applied as principles of education. In placing emphasis on the importance of taking ecological limits into account, Pilon (2003:3) avows that the relationship between sustainable development and economic growth has been overemphasized in the past. The same author shows that sustainability cannot be pursued within the prevailing development strategies which ignore, underestimate and undermine values and environments essential to healthy human development (*cf.* 1.1 & 2.4).

The link between ecological communities and human communities exists because both are living systems (Freiburg, 1999:16). The parallel between ecosystems and human communities is, thus, as cautioned by Lafee (2002:12), not just a metaphor, as the principles of ecology represent the patterns of life. In order to understand these patterns and living systems, Gutierrez *et al.* (2009:191) suggest a new way of thinking about school governance, namely systems thinking. In accordance, school governors` way of thinking must shift its emphasis from the parts to the whole (*cf.* 1.1).

Underscoring the above, Pilon (2003:1) explains that a diagnosis and prognosis of cultural, educational, environmental and health problems must consider the connections (assets) and ruptures (deficits) between the different dimensions of life

in order to provide a planning strategy to develop and evaluate teaching and learning programmes instead of making fragmented and reduced representations of reality. Emphasis placed on the parts is *mechanistic* as it emanates from *machine* celebrated methods of analytic thinking, introduced in the seventeenth century (Collins, 2003:214). This line of thinking has been an essential characteristic of modern scientific thought and has, according to Horton (2002:281), proven to be extremely successful.

Manganyi (2001:38), nevertheless, poses that when human beings are confronted with complex phenomena or problems such as HIV/aids, they tend to take it apart by reducing it into a number of small, simple pieces that are easy to understand (As such, the mechanism through which they interact is studied). The parts are only afterwards combined again to understand the whole. This approach is sometimes referred to as *reductionist* thinking. As living systems cannot be taken apart, the mechanistic/reductionist approach is, however, not appropriate for studying living systems (Davis, 1998:36, Poglinco *et al.*, 2003:2).

Instead of focusing on fragmented and reduced representations of reality, systems-thinking, to the contrary as highlighted by Maree (2008:56), considers the connections (assets) and ruptures (deficits) between the different dimensions, providing a planning strategy to develop management and teaching programmes to deal with societal problems by redirecting learners' lives and social behaviour. Before the latter can be achieved, Cloete and Bunting (1999:16) argue that the principles of ecology, the so-called *language of nature*, must be studied to become ecologically literate before the lessons of ecosystems can be applied to human communities.

Placing emphasis on the whole is referred to as *holistic* thinking (from the Greek *holos* meaning the whole) or *organismic* thinking, since an organism is only one of the main manifestations of a living system. In support, Cittadino (2002) highlights that the subject matter of ecology is not the individual organism, but rather the interrelationships between different systems. As indicated by Epstein (2002:20), this line of thinking has also been called *ecological* thinking as ecology entails the study of living communities.

As systems-thinking is important within an ecosystemic strategy, this kind of thinking merits further discussion.

3.3.1 Systems-thinking

Systems-thinking is a term that was coined in the late nineteenth and early twentieth centuries. Stoll and Fink (1996:21) point out that looking at reality from a holistic perspective became known as *systemic* and the way of thinking it implies, as *systems thinking* around the 1930s` and onwards. This type of thinking implies, as stated by Lafee (2002:12), thinking in terms of relationships, connectedness and context to, according to Steyn *et al.* (2010:171), explain mutual relationships between people, communities and institutions.

With specific reference to addressing the HIV/aids pandemic, Pilon (2003:5) opines that school policies should not be aimed at being ready-made *patches* put on bad situations to make them *right*. Instead of aiming at *mending* individual and/or social *defects* by focusing on needs, deficiencies and problems themselves, the same author feels that policies should be asset-based, internally focused and relationship driven, centring on inner resources and capacities' development. To solve societal problems, Eloff and Ebersöhn (2001:149), accordingly, postulate that, although the deficiencies in any given eco-system or subsystem must not be negated, focus should rather be placed on strengthening the inherent assets in a system, which will, in turn, enable humans to address existing deficiencies effectively.

Systems-thinking emerged simultaneously in several disciplines during the first half of the century, especially during the 1920s. It was pioneered by biologists, who emphasized the view of living organisms as integrated wholes whose properties cannot be reduced to those of smaller parts. This school of biology was called organism biology (Lafee, 2002:46; Miller & Harrington, 2000:227). Systems-thinking was further enriched by psychologists in the new school of Gestalt psychology. Gestalt is a German word meaning *organic form*. What these psychologists discovered was that living organisms do not perceive things in terms of isolated elements, but in terms of integrated perceptual patterns, *i.e.* meaningful organized wholes that exhibit qualities that are absent in their parts (Pilon, 2003:2). This is what they referred to as a Gestalt. The famous saying that *the whole is more than the sum*

of its parts was, for instance, coined by Gestalt psychologists (Joyce & Beverly, 2002:11).

Ecology, a very young science, is the third discipline in which systems-thinking emerged. Around the 1920s, the term *ecosystem* was coined, and with this term, ecology emerged as an independent science (Freedman, 2001:85; Stone, 1999:52; Dhar & Stein, 1997:42; Michell, 1996:316). While focusing on the study of animal and plant communities, ecologists also encountered this irreducible wholeness and in particular, the observed networks of relationships referred to as the *web of life*.

Systems-thinking, finally, also emerged in the quantum theory when physicists discovered that the world cannot be decomposed into independently existing elementary units (Motala & Mungadi, 1999:34; Venezky & Davis, 2002:40). As attention was shifted from macroscopic objects to atoms and sub-atomic particles, it was realised that nature does not show any isolated building blocks, but rather appears as a complex web of relationships between the various parts of a unified whole. By the 1930s, most of the characteristics of systems-thinking had, conversely, been formulated by organism biologists, Gestalt psychologists and ecologists (Robb, 2002:57, Hall & Hord, 2001:32).

In all of the above-mentioned fields the exploration of three types of living systems such as organisms, parts of organisms and communities of organisms had led scientists to think in terms of connectedness, relationships and context (Van Wyk, 1998:12). This new way of thinking was also, as shown earlier, supported by the revolutionaries in quantum physics in the realm of atoms and subatomic particles.

To provide further clarity, the key characteristics of systems-thinking will forthwith be scrutinized.

3.3.1.1 A shift from the parts to the whole

The first and most general characteristic of systems-thinking is a shift from placing emphasis on parts to focusing on the whole. In this regard, Castells (1996:17), Diggins *et al.* (1999:57) and Wenglinisky (2000:15) show that, although individual parts in any system can be discerned, it must be realized that such parts do not exist in isolation. The nature of the whole, accordingly, always differs from the mere sum

of its parts. In line herewith, Hartshorne (1999:37), Beck (2000:80) and Lee (2002:45) point out that the properties of a system can only be understood if the whole ecosystem is observed. When studying ecosystems, attention must, therefore, be placed on the interconnection between different parts.

With specific reference to the governing of schools, Schurink (2010:490) opines that a holistic understanding of the entire ecological social system of all educational role-players can be used as a cyclical consciousness-raising and knowledge-raising tool to attain a sustainable school governance strategy.

To attain such understanding, Loock *et al.* (2009:2) set forth that it must be acknowledged that the essential properties that define any system refer to the properties of the whole, since no single part can operate on its own. In this regard, Donald *et al.* (2002:41) stress that system properties arise from the interactions and relationships between different parts. These properties are therefore destroyed when the system is dissected, either physically or theoretically, into isolated elements (Wenglinsky, 2000:15). As a result, the different elements within a system continuously affect each other over time, depending on the elements' interaction with other elements of the system, while aiming at reaching a common purpose. The actions of the individual and the organization, accordingly, continuously feed back upon and influence each other (Loock *et al.*, 2009:8).

When a pandemic such as HIV/aids is studied within an ecosystemic framework, taking a holistic view will assist in understanding the behaviour of the youth better. It could lead to understanding why an insecure young child may find himself feeling better about himself when being unconditionally accepted within a group of, for instance, drug abusers. It could also lead to better insight into the reasons why the youth, who live under difficult circumstances such as poverty or in dysfunctional families, chaotic home environments, receiving ineffective parenting, experiencing a lack of positive family attachments and nurturing, are socially behaving as they do. In considering the interrelatedness between different systems, Van Wyk *et al.* (2007:342), moreover, stress that it could be understood why learners often act aggressively in classrooms, fail in their school performance and/or portray poor social coping skills.

An ecosystemic perspective is defined by Donald *et al.* (2002:41) as *a blend of ecological and systems theory view of human interactions between individuals and between different levels of the social context.*

Since schools do not operate in vacuums and are part of specific communities, various environmental factors might also influence their activities (De Bruyn *et al.*, 2003:36). In this regard, Emener (2009:354) stresses the fact that schools play an extremely important role in a society, especially in terms of the future society.

Such a perspective, consequently, encompasses a scientific study of the progressive, mutual accommodation as well as the lifelong interaction between active and growing human beings on the one side and the changing properties of the immediate settings in which they live, on the other side (Kirsten *et al.*, 2009:3).

In this regard, Di Scipio (2003:5) refers to the dynamical interdependencies among system components as systems *act upon* the environment; observe the latter's reactions and then react, based on the environment's response. Kirsten *et al.* (2009:3), similarly, show that a system regulates itself through a series of feedback loops. Feedback loops travel back and forth within the system in order to provide stability, equilibrium and homeostasis for the person as a living being. The constitutive parts are, thus, constantly changing in order to keep the human being balanced as disturbances, according to Guskey (2000:33), affect the ability of the whole system to recover its equilibrium and sustain it.

By placing emphasis on a holistic view (the social strategy), Eloff and Ebersöhn (2001:148) point out that more focus is placed on the broader social context in which problems manifest, than on the problem *per se*. The latter contributes to a more complex understanding of societal problems such as HIV/aids.

Systems-thinking as a new way of thinking, in conclusion, refers to thinking in terms of connectedness, context and relationships (Peterson *et al.*, 1998:149; Galton *et al.*, 1999:19; Chall, 2000:16; Telem, 2001:65).

3.3.1.2 A shift from analysis to context

The second characteristic of systems-thinking entails thinking in terms of context. Apposite to analytical thinking that concentrates on taking phenomena apart in order to understand them, Fullan (2000:96; *cf.* 1.1) asserts that systems-thinking is contextual as it implies putting phenomena into the context of a larger whole. The need for the latter way of thinking stems from the realization that living systems can only be fully understood within the context of the larger whole (Solom *et al.*, 2000:55). In order to understand the HIV/aids pandemic, its different elements must, accordingly, not be taken apart, but rather studied within the larger context (Kelly, 2001:39). The latter is important as the properties of living systems are not intrinsic, but the result of the connectedness between different parts. To understand this, the human being must be understood in the context he/she lives in (Garet *et al.*, 2001:915; Sammons *et al.*, 2000:14; *cf.* 2.4).

3.3.1.3 A shift from objects to relationships

During the 1920s, physicists discovered that, what was originally referred to as *parts*, merely referred to patterns occurring within an inseparable web of relationships (Lyons, 2000:72). Although it may be useful to define parts, it was realised that such definitions tend to be rather arbitrary and approximate. In line with the latter, Streifer and Philip (2002:23) propose a shift from the parts to the whole that will tend to be more flexible -- a shift from objects to relationships.

Following the above, Flecknoe (2001:13) distinguishes between taking a mechanistic view through which the world is seen as a collection of objects and the relationships between them as secondary and a systems view through which it is realized that the objects themselves - the organisms in an ecosystem or the people in a community - form networks of relationships, embedded in larger networks. For the systems thinker, the existing relationships are, therefore, primary, while the boundaries of the discernible patterns, the *objects*, are secondary (Sweeney, 2003:45).

Buenfil-Burgos and Nidia (2000:24) indicate that the world consists of relationships, and that circles are drawn around certain patterns occurring within these relationships, which in turn are referred to as objects. To illustrate the latter, Kraak and Nissar (2001:20) refer to the fact that when people are asked to draw a tree as

an object, they do not draw the roots of the tree although the tree cannot exist without roots (the relationship between the tree and its roots). Placing emphasis on relationships and not merely on objects is, thus, extremely essential for systems-thinking. Underscoring the latter, Brown (1999:234) underlines the importance of studying educational role-players in terms of their relationships with one another when any educational issue is addressed.

When taking a systems-view, it is therefore important to acknowledge that objects themselves, namely the organisms in an ecosystem or the people in a community or, with specific reference to education, the different role-players, consist of relationship networks, embedded in larger networks. This vividly illustrates the importance of cooperative governance, *i.e.* the way school governors cooperate with the community, parents, educators, learners and administrators (Brown, 1999:234; *cf.* 1.1). In support, Schmoker (1998:45) as well as Joyce and Beverly (2002:98) opine that the nurturing of the learning community entails the nurturing of the existing relationships between different educational role players.

In terms of the HIV/aids pandemic, systems-thinking will, accordingly, highlight the challenges it presents within an educational context. It will take note that increased educator absenteeism (*cf.* 2.4.2), as a direct result of this pandemic, *inter alia*, places higher demands on other educators (*cf.* 1.1 & 2.4.2.1), which often leads to colleagues becoming antagonistic towards one another spilling over into unhealthy relationships.

3.3.1.4 A shift from hierarchies to networks

Bird and Elliot (1996:64) argue that, when schools consider all educational relationships and the networks within networks, they will soon realize that different multi-levelled structures of systems within systems exist. To comprehend the latter, another key characteristic of system-thinking entails the ability to shift attention back and forth between different system levels.

Such a shift implies that humans are studied as a network of relationships between different inherent elements (personality, identity and self-concept) and various external elements, including societal relationships within social systems, and within different ecosystems (McWhirter *et al.*, 2004:22; Berends *et al.*, 2002b:40; Cox,

1997:56). It must, therefore be borne in mind that human beings, at each level, live in systems that are integrated wholes which, at the same time, also constitute parts of larger wholes. Throughout the living world, living systems are thus nested within other living systems.

Since the early days of ecology, these multi-levelled arrangements have been called hierarchies (Hanson, 1997:55). This term can, however, as cautioned by Lyons and Gay (2001:11), be rather misleading, since it is derived from human hierarchies which consist of fairly rigid structures of domination and control, quite unlike the multi-levelled order found in nature. The view of living systems as networks provides, according to the same authors, a helpful new perspective on the so-called *hierarchies* of nature.

Since living systems at all levels form networks, Guskey and Sparks (1996:36) emphasize that schools must visualize the web of life as living systems (networks) interacting in a network fashion with other systems (networks). In this regard, Bodilly (1996a:119) as well as Hess and Frederick (1998:12) point out that human beings tend to arrange these different systems, all nesting within larger systems, in a hierarchical scheme by placing the larger systems above the smaller ones in a pyramid fashion. The latter implies not only a shift in perception, but also a shift of actual structures in a community. With reference to education, Becta (1998:43), MacDonald (1998:244) and Morris (2001:87) indicate that School Governing Bodies need a shift in their organizational structures from hierarchies to networks. If these bodies want to create sustainable school communities, they need to ensure that the network of relationships within schools is nurtured.

3.3.1.5 A shift from structure to processes

The characteristics discussed so far, can, according to Castells (1989:32), be seen as different aspects of one great strand of systemic-thinking, which may be called *contextual thinking*. Contextual thinking, as asserted by Kallaway *et al.* (1998:42), implies thinking in terms of connectedness between context and relationships. This is in line with the Latin root of the word *context* meaning *weaving together*.

Another strand in systems-thinking, of equal importance, is process-thinking (Castells, 1998:32, Kallaway *et al.*, 1998:42). Within the mechanistic framework of

Cartesian science, fundamental structures as well as forces and mechanisms, through which these structures interact, exist, which gives rise to processes. In systems-science every structure is, thus, seen as the manifestation of underlying processes. As such, structures and processes co-exist they are two sides of the same coin. As pointed out by Kraak and Nissar (2001:9), as well as by Bird and Elliot (1996:64), systems-thinking always includes process-thinking.

Within the parameters of the above, Becta (2003a:99) and James (2000:65) say that school governance should be concerned with managing, facilitating and guiding a process of change to combat HIV/aids instead of designing and mandating change (*cf.* 2.2 & 2.4.1).

3.3.1.6 Open systems

De Clercq (1997:131) posits that all living systems are open systems as they need to feed on a continual flow of matter and energy to stay alive. Just as plants take up energy from the sun, transform it into chemical energy and use it to build complex organic substances such as protein, carbohydrates, and fats (Kahn & Michael, 1998:281) needed for humans and animals to survive (Becta, 2003b:24), humans need to generate energy flowing through systems, while a dynamic balance is maintained despite continuous structural changes (Newman & Wehlage, 1999:63). While referring to structural changes, Crawford (2001:53; *cf.* 2.4.1) explains that systems-thinking regards changes in human life as more than just adapting to different environmental changes, as they are intrinsic to properties of life.

In order to sustain schools as sub-systems, the relationships and cycles occurring within them therefore need to be ecologically balanced. In this regard, Pilon (2003:3) cautions that small inputs in systems that are far from equilibrium may, conversely, trigger massive consequences. The moment hindering forces such as an HIV/aids pandemic (bringing instability – disturbing the equilibrium) occurs, countering driving forces must be instituted to rebalance the system (bringing stability – restoring the equilibrium; *cf.* 2.4.2).

According to Loock *et al.* (2009:3), one of the most important characteristics of a system is its ability to maintain a steady state. The latter is, however, not a motionless or true static balance. It is a dynamic balance that maintains itself by

means of continuous movement and, hence, it is known as a dynamic equilibrium. If schools are, consequently, to exist in a state of dynamic equilibrium, there needs to be forces put in place tending towards consonance or order for all forces tending towards dissonance or disorder (Loock *et al.*, 2009:3).

In order to maintain equilibrium and stability at schools and counter the dissonance caused by an ever-changing environment, both the individual and the organization need to contribute to the establishment of an effective individual-organizational relationship (Loock *et al.*, 2009:7; *cf.* 2.2; 4.3). In this regard, the school environment and climate are understood as being characterized by the interrelatedness and interdependence of all the dimensions of the school, namely the ecology, milieu, culture and existing social systems (Bender & Emslie, 2010:56).

In adapting to its environment, systems will, as avowed by Loock *et al.* (2009:4) attempt to cope with external forces by acquiring control over them. Social systems will move towards incorporating external resources (management and organizational resources) essential for their survival and, as a consequence, expanding the original system.

Kirsten *et al.* (2009:3), similarly, show that a system regulates itself through a series of feedback loops. Feedback loops travel back and forth within the system in order to provide stability, equilibrium and homeostasis for the person as a living being. The constitutive parts are, thus, constantly changing in order to keep the human being balanced as disturbances, according to Guskey (2000:33), affect the ability of the whole system to recover its equilibrium and sustain it.

With specific references to schools, Bronfenbrenner (1986:726) opines that ecological principles can be successfully applied in creating sustainable learning communities and school organizations, while Guskey (2000:19) states that it provides a useful theoretical framework for research on the implementation of strategic governance at schools. In this regard, Pilon (2003:3; *cf.* 1.1) stresses that sustainability cannot be pursued within prevailing development strategies, which ignore, underestimate and undermine values and environments essential to healthy human development.

3.3.1.7 A human ecology theory

A human ecology theory conceptualizes the family or individual and their relationships and interrelationships with their near and far environment. The term *ecology* originated in several disciplines (Berends *et al.*, 2000b:43). A key aspect of the human ecology theory, as highlighted by Timperly and Robinson (2000:53), is the survival process which incorporates the ability of the individual or institution to adapt to environment inputs.

The concept of human beings and their well-being, as a function of their relationship with their environment, achieved a heightened interest during the latter part of the nineteenth century during the Industrial Revolution when families and individuals moved from farming communities to urban areas and were sometimes caught in a web of poverty, isolation, disease and difficult working environments (Newman *et al.*, 1999:226; *cf.* 1.1). It was during this time that Spira (1998:54) utilized, what she then termed as *oekology*, as a means for applying the principles, methods and results of science to the improvement of people`s lives and their environment. During the early years of the field of *home economics*, as it was later termed, emphasis was placed on the effects of various impacts on the family such as air and water pollution, sanitation and waste disposal, preservation, the storage and cooking of food, as well as clothing and furnishing for the family`s safety, health and aesthetics (Ginsberg *et al.*, 2001:99).

An environmental movement, during the 1960s, again placed emphasis on the impact humans have on their environment and *vice versa* (*cf.* 2.4). Pioneers of the human ecology theory, such as Berends *et al.* (2002b:71) who studied learners and their environment, and Bernstein (1998:5) who applied this theory to a human resource management framework, later also highlighted the importance of such a theory (Klein *et al.*, 2000:223). Whelan (2000:66), in addition, emphasized a contextual study of learners and their relationship to their environment. This author conceptualized the human ecology strategy as being *like a set of nested structures, each inside the other like a set of Russian dolls*. Each of these nested systems comprises, as put forward by O`Donoghue and Chalmers (2000:889), four levels of analysis, namely the micro-, meso-, exo- and macro system.

Al Plus communications (1999:20) used a similar, but slightly different strategy which involves the family and the environments the family live in, radiating outward from the centre. At the centre of this strategy lies the built environment followed to the outside by the socio-cultural environment and then, finally, the outermost circle encompasses the natural/physical environment. This basic human ecology strategy or framework is applied to a family resource management strategy, which is basically a systems feedback strategy. This strategy consists, as outlined by Loock *et al.* (2009:2), of basically three parts, namely input, the transformational process or throughput and outputs.

As an input, the family and their varying characteristics (race, composition, socio-economic status, age and place in the life course) and the family's relationship with the external environment are firstly placed at the centre (Ball, 1999:38). The decisions taken by the family with regard to the input or energy introduced into their system are thereupon conceptualized as the throughput. The actions flowing from the decisions that have been generated are referred to as the outputs. Essential to this strategy, is that a feedback loop exists from the output back into the input and the throughput portions of the strategy (Chun *et al.*, 2001:1).

Although this strategy traditionally applied to family decision-making processes, Becta (2003a:5) is of the opinion that it can be equally useful as a conceptual strategy for school governance purposes because it conceptualizes the unit of analysis and environment as having an interactive or two-way relationship with each other, rather than a static one-way impact of environments on individuals.

With specific reference to schools as sub-systems, Loock *et al.* (2009:2) indicate that inputs consist mainly of social forces and institutions which influence and make demands on schools. They include skills that individuals bring with them when joining schools and the resources available to schools. The transformational process is the process whereby schools convert the inputs from the environment into outputs. It includes the management processes used and the context within which one has to manage. The competence of the principal as leader and manager of the school and the quality of teaching processes are only some of the components that influence the culture of learning and teaching within schools (*cf.* 1.1). Human resource management and school governance, *inter alia*, also play an important role. Outputs

include aspects such as achievement and dropout rates (*cf.* 2.4.3) among learners, absenteeism (*cf.* 2.4.2.1), educator turnover and work satisfaction, as well as attitudes (*cf.* 1.1).

Stemming from its biological beginnings, one of the core concepts underlying the human ecology theory is that of survival (Annenberg Institution for School Reform, 1998:36). Other core values have been proposed that should drive the theory such as *human betterment* or an increase in, what Bodilly (1996b:298) calls, *the ultimate good* which includes:

- something more than economic adequacy (riches in contrast to poverty, nourishment in contrast to starvation, adequate versus inadequate housing, and clothing, healthcare, as well as other essentials for life),
- justice and equality in access to work, education and health (*cf.* 1.1 & 2.4),
- freedom in contrast to coercion and confinement, and
- peacefulness in contrast to war and strife (Baloyi, 2001:14).

Other virtues, included by Leask (2001:23), are loving and nurturing relationships, productive and healthy work environments, a sense of meaning and community, and the ability to develop into human beings that are generous, courageous and tolerant. These virtues mesh with the purpose of effective democratic governance, which is to facilitate a participatory leadership for the betterment of school participants and beneficiaries. These virtues are also congruent with the goal of *development* in general, which is to foster human development, learning and empowerment for the betterment of the general good (Noddings, 2001:2; *cf.* 4.2).

The HIV/aids pandemic presents educators, education managers and other role players with ongoing formidable challenges. Educators in South Africa, accordingly, report high levels of stress (Hay *et al.*, 2001:214; *cf.* 1.2 & 2.4.2.1). Aggravated by the impacts of the HIV/aids pandemic, numerous affected educators, moreover, report that both their personal and professional functioning are compromised because of pandemic-related stressors, such as grief, fear, escalating workloads, pastoral care demands and many others (Coombe, 2003:25; Hall *et al.*, 2005:15).

3.4 THE ECOSYSTEMIC IMPACT OF THE HIV/AIDS PANDEMIC ON EDUCATORS

From an ecosystemic perspective (Bronfenbrenner, 1979:15; Donald *et al.*, 2006:5), educators are ecologically situated beings. In other words, the educator functions within a dynamic, interconnected constellation of micro-, meso- and macro-systemic relationships. These relational contexts impact on educators' identities and experiences (*cf.* 2.4.2.1). South African educators are situated within an HIV/aids-impacted ecology, which frequently translates into de-motivation (Hall *et al.*, 2005:213; *cf.* 1.1 & 2.4.4). To say that educators are micro-systemically affected by the HIV/aids pandemic means that their experiences include loving or caring for an HIV-positive significant other, and consequently knowing the grief, trauma and despair accompanying such experience, as well as the fears and risks of personal contagion (*cf.* 2.4). The importance of the latter is highlighted by Naidu *et al.* (2008:25; *cf.* 1.1) in pointing out that the greatest obligation placed on educators is to protect learners, which may now be harder than ever.

Louw (2008:227; *cf.* 1.1 & 2.5) accentuates the fact that a school system needs to be fully functional for effective teaching and learning, aimed at improving the quality of life and building a prosperous South Africa for all to occur. Donald *et al.* (2002:21), in line herewith, stress the specific purpose of schools as creations of society to teach, guide and develop society's children and youth.

When educators work in schools that are heavily affected by HIV, they will experience firsthand that their learners are HIV-positive and how this impedes healthy development and obstructs learning. As such, they become familiar with the hardships of learners who are orphaned or made vulnerable by their parents' HIV status. In these contexts, many educators do more than teach their affected learners: they nurture, counsel, aid, support and feed them. The pastoral role of the educator is enshrined in the Department of Education's Norms and Standards for Educators as pointed out by Harley and Barasa (2000:301). Many educators are, however, wearied by these multiple roles and distressed by the plight of their learners (*cf.* 1.1 & 2.4.2.1).

Flowing from the above, educators may report that their patterns of social interaction become attenuated as they fear being stigmatized (*cf.* 2.2 & 2.3) or rejected because their love ones are HIV-positive. They may, moreover, describe how their religious faith and physical appetite diminish, while some may report on their sleeping patterns being disrupted, leaving them vulnerable (Theron, 2007:179 Serero, 2008:16; Ngemntu, 2009:17).

Since schools are expected to communicate knowledge (*cf.* 1.1 & 2.4), instil values and promote behaviours that will enable learners to protect themselves against HIV/aids, Van Wyk and Lemmer (2007:311) argue that education, in a world with HIV/aids, must inevitably differ from education in a world without HIV/AIDS. Messages pertaining to abstinence, safe sexual activity, fidelity to one partner, protection against mother-to-child transmission and using sterilized needles must, according to Kelly (2000:2), be communicated to individuals by schools, if such messages are to be acted on. South African educators have been tasked with the responsibility of teaching the country's youth how to avoid HIV infection (DoE, 1999:29).

The overall role of schools to educate society is also emphasized by the International Labour Office (ILO, 2000:9; *cf.* 2.4.2) reporting on the exceptionally difficult task of replacing top management and skilled line workers infected by HIV/aids. This is because top management and highly skilled employees have certain specialized tasks and experience that unskilled employees do not possess. There is already a shortage of skilled workers in South Africa. The need for well educated individuals that enter the workforce is therefore evident. This, in turn, also highlights the importance of HIV/aids education at schools.

Educators, who have colleagues who are HIV-positive and hence frequently absent, have lived experiences of how exhausting it can be to accommodate such a colleague's classes and workload (Carr-Hill, 2003:17; Coombe 2003:25; Van Wyk & Lemmer, 2007:303; *cf.* 1.2 & 2.4.2.1). Research conducted by Theron (2005:57; 2.2 & 2.3), for example, reports on educators complaining about the burden of trying to bolster HIV-positive colleagues and, in some instances, the strain of trying to avoid such colleagues. The morale of educators is, as avowed by Shisana *et al.* (2005:12), also likely to fall as they deal with the illness and mortality of colleagues, relatives

and friends. When educators live in communities that are heavily HIV-affected, they are relatively well aware of the negative economic and social impacts of the epidemic (Thurman, 2000:6). They may have lost neighbours or community leaders to HIV-related illness. Many lament the high incidence of social shame that still clings to HIV and aids (Theron, 2007:183).

Providing sex education to learners by itself may also, as avowed by Carr-Hill (2003:17) and Coombe (2003:25), engender stress for many educators, as not all are comfortable talking about safer sex, while others feel that they were not adequately trained to cope with this difficult task. With specific reference to South Africa - one of the countries with the highest HIV-incidence globally, and one in which people living in rural areas, bear the brunt of the HIV/aids epidemic - the UNAIDS (2008; *cf.* 1.1) reports that everything within this country's micro- and meso-ecosystems is occurring against the background of its macro-system.

Educators, furthermore, are often expected to act as counsellors and change-agents in the community in the face of the pandemic (Bhana *et al.*, 2006:17, Bennell & Akyeampong, 2007:19). As such, educators are expected to fulfil a pastoral role in understanding and responding effectively to communities' pressing problems, such as HIV/aids (Ferreira *et al.*, 2010:211).

As South African educators, as individuals, may be affected by HIV on all or any of their ecological systems, they are faced with multiple proximal and distal challenges. As a result, Theron (2009:239) accentuates the fact that educators need to receive support. Supportive of the above, Grösser (2007:51) points out that educators need ongoing sustained support, encouragement and recognition to succeed in improving the quality of teaching and learning. To ensure quality throughout the education system, Lessing and De Witt (2007:53), Leonardo, (2004:13), Harley & Parker (2006:864), Mohlokoane & Coetzer (2007:18) as well as Engelbrecht and Green (2001:v; *cf.* 2.4), consequently emphasize the need for the ongoing professional development of educators as key elements in meeting the diverse needs among South African learners.

As a constructive framework for discussing potential forms of support, an ecosystemic theory will forthwith be discussed.

3.5 ECOSYSTEMIC SUPPORT AS A RESILIENCE-PROMOTING RESOURCE

Ecosystemic theory emphasizes that individuals and groups are linked in variable, interactive and mutually dependent (Donald *et al.*, 2002:7), as well as supportive ways. Multiple studies have, accordingly, documented the value of micro-systemic support (such as support from family members) when individuals are confronted with societal problems (Hjemdal, 2007:318; Schoon, 2006:18; Masten & Reed, 2005:18). Louw (2008:225) recognizes constant nurturing relationships, supervision, emphatic understanding, open communication and cohesion as qualities within families that may contribute to a human's ability to overcome such problems.

Authors such as Ugar (2008:228), Hodgson (2007:38) and Schoon (2006:22), on the other hand, emphasize sources of support that can potentially be present within an individual's meso-systemic ecologies (such as schools and communities) and even in his/her macro systems.

A resilience theory suggests, as pointed out by the same authors, that individuals are enabled towards flexibility when their ecologies actively bargain for and offer quality resilience-promoting resources at all ecosystemic levels (supportive families, employee assistance programmes, community support groups). It also suggests that individuals should steer towards and make the most of such resilience-promoting resources, while negotiating for resilience-promoting resources that would support them towards greater well-being. Effective social support outside the family is, moreover, regarded by Louw (2008:225) as being critical in building flexibility as it implies relationships with caring individuals (friends, church leaders, educators/colleagues) who can be trusted and can provide safe places (*cf.* 1.1 & 2.4) where emotions can be expressed.

When current South African supportive undertakings aimed at empowering educators challenged by the HIV/aids pandemic are reviewed, it becomes clear that there is some ecosystemic support available (mostly at the meso- and macro-systemic levels). Furthermore, educators are potentially supported by within-school support services (school support teams) and extra-school support services (district support teams; Donald *et al.*, 2002:101), as authorized by the Department of

Education`s policy on inclusive education (DoE, 2001:15). The South African Democratic Teachers` Union (SADTU) and the National Professional Teachers` Organisation of South Africa (NAPTOSA) have, in addition, sanctioned the supportive policies of the Department of Education (Simbayi *et al.*, 2005:19, UNESCO & EI-EFAIDS, 2007:49) and they have added policies of their own (advocating tolerance, support and HIV prevention) to govern members, thereby implicitly acknowledging the value of supportive policy.

Singh (2003:7; *cf.* 1.1), nevertheless, urges the South African education system to recognize, in this *state of emergency*, the opportunity to review and redesign the way educators teach and learners learn, and to redirect the education system to new and higher ground. Bisshoff (2007:2), similarly, shows that schools need to be dynamic organizations that configure opportunities for learner success.

Research conducted by Theron (2009:231-242), moreover, shows that many South African educators urgently ask for compassion as a form of support from various ecosystemic strata, including school management, colleagues, learners, parents, the Department of Education and communities, thus begging for what the researcher refers to as *ecosystemic compassion*. Participants with ill family members due to HIV/aids indicated, according to Theron`s (2009:235) research, that they need empathic managers who would understand the epidemic`s impact on educators` time management and for their extenuating and demanding circumstances. Some verbalized the need for management not to discriminate (*cf.* 1.1 & 2.4) against them because of declining professional behaviour.

Some educators, furthermore, intimated that disclosure about HIV-infected families implied management that should tolerate their weakening professionalism. They also wanted management to restrict their expectations regarding educators` professional commitment. Several participants hoped that such compassionate understanding would translate into workload relief. The vast majority of participants, who were caring for HIV-infected families, suggested that colleagues had a responsibility to provide enabling emotional support and compassion. Such support included unconditional acceptance and respect, affirmations and encouragement or advice on how to cope. Participants, in addition, indicated that collegial compassion needed to extend to patience and tolerance (*cf.* 2.4.2.1). They begged for tolerance that

included not complaining about epidemic-related absenteeism or reproaching such colleagues for contributing to staff stress (*cf.* 1.1 & 2.4.2.1). They also needed similar tolerance and support from their communities (Theron, 2009:240).

With reference to the characteristics of children, to the contrary, that may promote resilience, Louw (2008:224) includes factors such as an active rather than passive orientation to problems, persistence in problem resolution, access to a range of flexible strategies to respond to problems, the development of a broad range of interests and goals, as well as skills in using peers and adults from whom support and assistance can be obtained. The same author (2008:225) proposes that any resilience-based strategy of care for children should include, firstly, permanent support and care of a high quality as soon as possible after the death of a parent; secondly, open communication about HIV/aids and the provision of accurate facts; and lastly, the strengthening of internal coping abilities by exposing them to problem-solving and emotional expressing opportunities, esteem-building experiences and allowing them to participate in decisions regarding their futures (*cf.* 1.1 & 2.2).

In placing emphasis on peer-led interventional programmes, Pillay and Wasielewski (2007:19) indicate that such programmes could be employed with great success to support children confronted by social problems. The latter is based on the assumption that behaviour is socially influenced and that behavioural norms are developed through interaction. Since friends are often the main source of information about sexual practices and peer influence generally motivates the youth's behaviour, peer intervention may be used with success. Adolescents are, moreover, more likely to change their behaviour if they observe trusted peers changing theirs. As such, peer education and support can be regarded as an appropriate strategy to deal with the HIV/aids pandemic.

3.6 CONCLUSION

Bronfenbrenner's ecosystemic system strategy proved to be useful in studying the effects of HIV/aids on education as well as to how schools can be governed to combat it. By discussing the devastating effects of this pandemic as a social constructed phenomenon on all the systems in which humans develop, chapter 2 also emphasised the interconnected nature of these systems. In line with this, an

ecosystemic strategy recognises the dynamic balance, interconnection, interface and responsiveness between the different dimensions of a person's world.

Because of the equivalence between ecological communities and (ecosystem) and learning communities (schools as sub-systems), the need arises for school governors to become ecologically literate and think in a systems manner when leading schools to be safe havens in which optimal teaching and learning can transpire. This entails placing emphasis on the whole (obtaining a holistic view) rather than the parts of a problem during decision-making processes and thus not merely to analyse the effects of HIV/aids but also to place it in context with the larger whole. As such, School Governing Bodies will be able to better understand the educators and learners they work with and also to deal effectively with problems that arise. By shifting their attention from objects to relationships, school governors will moreover be empowered to effectively collaborate within a system of cooperative governance.

An ecosystemic strategy will, in addition, authorize school governors to avoid building hierarchies by placing their schools above smaller systems but rather to build strong networks of relationships by creating sustainable school communities. As such, School Governing Bodies will be enabled to put processes in place to combat problems such as HIV/aids and thus obtain ecological balance within schools.

Since a deeper understanding of school governance *per se* is needed to evaluate the effectiveness of an ecosystemic governance strategy, the next chapter discusses school leadership by distinguishing between important concepts such as governance and management.

CHAPTER 4

SCHOOL GOVERNANCE

4.1 INTRODUCTION

The previous chapter dealt with ecosystemic theories by explaining an ecosystemic strategy in general and accentuating the importance of a thorough understanding of ecosystems. In elaborating on Chapter 2, this chapter also indicated the negative effects the HIV/aids pandemic has on all ecosystems and on educators specifically. Since dealing with social disturbances such as HIV/aids, in order to attain a dynamic equilibrium (*cf.* 3.2), necessitates a total adaption in behaviour, the concept of systems-thinking was explained, followed by a discussion on ecosystemic support as a resilience-promoting resource.

In expanding on an ecosystemic theory and its direct impact on the governing of public schools, this Chapter converses information on governance by firstly defining and describing governance as a general concept applicable to all organizations, and secondly discussing leadership at schools with specific emphasis on school governance. The latter is done within a legislative framework. A distinction is, moreover, drawn between school management and school governance, as well as between different people responsible for each function.

As it can be argued that school governance by School Governing Bodies (hereafter referred to as SGBs) brought the governance of schools closer to *the people* in line with South Africa's new democratic dispensation, attention is, above all, devoted to the success and/or failure of SGBs to cooperate with all educational role-players and to be recognized by the latter.

The discussion that follows will, however, be limited to relevant aspects regarding school governance within the scope of combating HIV/AIDS at schools as governance *per se* is recognized to be a much more comprehensive concept.

4.2 GOVERNANCE

In order to comprehend school governance fully, governance in general will firstly be addressed. Hyden (quoted by McLennan, 2000) views governance as an umbrella concept which is able to define an approach to comparative politics. Such an approach concentrates, not on the performance of governance *per se*, but on the social and rational nature of legitimate authority implying linear rather than hierarchical strategy of change (*cf.* 3.3.1.4), as the latter undermines the process of participatory democracy and development. The same author also argues that sound governance involves power relationships characterized by mutually rewarding (*cf.* 3.3.1.1) and beneficial relationships (*cf.* 3.3.1.3). This definition supports the importance of an ecosystemic theory emphasizing the importance of taking cognisance of the wider social systems in which any action must be executed (*cf.* 3.3).

McLennan (2000) defines governance as the collaboration of complex political, socio-economic and institutional relationships between various role-players. As a result, governance refers to structural frameworks as well as to the distribution of control and authority networks in order to justify the distribution of resources in obtaining overall development. Applying this definition to the study, it is apparent that it correlates with an ecosystemic theory highlighting the fact that building healthy relationships across different systems (*cf.* 3.3.1.3) and accentuating a shift towards networks (*cf.* 3.3.1.4) are paramount.

In a corporative sense, governance entails, as explained by Bouwman (2010:26), a system by which companies are guided and restricted. In line herewith, McLennan (2000) shows that governance can be understood as a process of collaboration with the main objective to identify the opposed forces that exist as well as the patterns presenting themselves in a specific sphere and then to identify specific interventions capable of creating a more advantageous position. These definitions accentuate the importance of becoming aware of problems such as HIV/aids, establishing proper intervention programmes and directing them towards solving such problems (Barry, 2006:153; *cf.* 1.1).

Posthumus and Von Solms's definition (2010:575) brings governance directly in line with an ecosystemic theory as it recognizes that governance consists of people as a key element. As such, the same authors point out that, whenever people are involved in a situation, it robotically becomes a social phenomenon which necessitates the probing of the actions and behaviours created within the multifaceted human mind (*cf.* 3.3.1.7). In order to understand what influences human behaviour, Frumence *et al.* (2010:10; *cf.* 3.3.1.6) posit that the social structures and interactions (*cf.* 3.2) of humans need to be studied. This definition underscores the importance of this research, namely to propose a school governance strategy based on the facts obtained in order to motivate a solution to the challenges associated with sexual behaviour in combating the HIV/aids pandemic in South Africa.

Since governance includes leadership and organizational structures, processes and mechanisms, together with the delegation of roles and responsibilities as well as compliance therewith, ensuring that an organization reaches its objectives (Kaselowski *et al.*, 2010:335; Posthumus & Von Solms, 2010:581), school leadership and school governance must be scrutinized. The latter will be done by firstly referring to the legislative framework within which such actions must be executed.

4.3 A LEGISLATIVE FRAMEWORK FOR SCHOOL LEADERSHIP, MANAGEMENT AND GOVERNANCE

Legislation during the 19 century led, as encapsulated by Bouwman (2010:26), to the incorporation of companies to the benefit of individuals, as companies were thereafter bestowed with separate juristic personalities implying that they obtained rights and responsibilities *per se*, giving rise to limited liability for their owners.

Within the scope of the above, the South African Schools Act (84/1996: section 15) declared public schools as juristic persons. The latter led, as avowed by Bouwman (2010:26), to a split between the State - which owns public school buildings - and the management of such schools - who control schools. The same author opines that the split between ownership and management created an agency risk: the risk that management (as the agent of the owner) may start to act opportunistically and in its own interest, rather than in that of the owner. To minimize such risk, the idea of sound governance issues arose, eventually leading to the evolvment of the

principle of corporative governance concerning structures and processes associated with management, decision-making, as well as control in organizations and, thus, the governing of organizations from the top.

Minnaar and Bekker (2005:570) refer to corporate governance as a management tool capable of facilitating good governance of the public sector by directing and controlling strategic decision-making processes. As a result, it is the responsibility of corporate governing bodies to, as indicated by Newson (2002:16), provide strategic direction, exercise control in the form of performance targeting, enforce legal and regulatory compliance by all members, define delegated authority, take responsibility for the introduction of effective risk and performance management, assess ongoing development, communicate with all role-players, take charge of processes necessary for successful executive succession, promote organizational integrity, focus on key corporate objectives and always act in the best interests of an organization.

In view of the fact that education is a public enterprise, it is governed by public policy. As a yardstick in this regard, the National Education Policy Act, 72 of 1996 (an exosystem factor) provides clear guidelines as to who will be responsible for the development of National Education Policies, how the process of policy development in South African education will develop, and how such policies should guide all educational role-players to achieve national education goals and objectives. Section 4(m) of this Act explicitly provides that community participation in the development of education policy should be realized as one of the guiding principles in education and that all interested parties must be involved in all aspects of the education system.

Within the parameters of the Constitution (1996), provincial policies and national policies, SGBs are expected to develop various school policies such as admission policies (Schools Act, 84/1996: subsection 5(5)) and language policies (84/1996: subsection 6(1)). SGBs are also obliged, in terms of section 7 (84/1996) to compile rules regarding religious observances and, according to section 8, a Code of Conduct for learners. The goal of school policies, just as in the case of all other policies, is to lay down guidelines, rules or directives for effective school governance and management. A code of conduct is furthermore, as set forward by Prinsloo (2006:309), essential for setting forth the expectations and standards for learner

behaviour by putting the necessary procedures in place for dealing with threats to safety and security, and for protecting learners and staff against any physical and psychological danger. Smit (2007:56), however, cautions that the mere setting of rules is not enough; they should also be clearly communicated, consistently enforced and fairly applied in practice to be effective and bring about the desired results.

Such procedures, guidelines and/or rules are important since, if applied consistently, they will assist in preventing tension and conflicts among role players and in ensuring that learners know exactly what is expected of them to do under all circumstances, which will in turn, contribute towards the smooth running of schools (Oosthuizen, 2005:101).

In this regard, Oosthuizen (2005:101) opines that the importance of school policies can never be overemphasized as they provide standards which ensure that everyone at school is treated as fairly as possible, create consistency in dealing with specific matters and provide a secure environment and legal certainty as everyone knows what is expected of them. In view of Le Roux *et al.* (2007:41) policies are, in addition, the most appropriate means to address contemporary issues as they create awareness of existing problems which, in turn, may lead to its prevention. The need to liberate workplaces and thus also schools, from serious diseases such as HIV/aids, has become, as outlined by Mokgoro (2007:v), an important management responsibility in any contemporary organization.

As part of the transformation process in the South African education system, the State aims at establishing a decentralized education system as opposed to a centralized system in which functions and coherent authority are concentrated in the Department of Education. As a direct result of the latter, SGBs, serving as a barometer of the community (Steyn *et al.*, 2007:99), are provided with increased functions, powers and responsibilities (Schools Act, 84/1996: sections 20 & 21). The latter includes not only developing schools policies, but also leading and governing public schools.

SGBs are, as put forward by Clase *et al.* (2007:246), established by the State to function as instruments/agencies of the State. As such, SGBs must function in partnership (Schools Act, 84/1996 with all educational role-players (parents,

learners, school staff and communities) to make valuable inputs in the education process (*cf.* 2.2) and to convert public schools into democratic institutions where principles of representation, participation, openness and accountability are present. The Schools Act (84/1996: Chapter 3, 3.4), moreover, obliges SGBs to create and develop such partnerships based on trust and respect among educational role-players.

The idea of a partnership between SGBs and the State is regarded by Oosthuizen (2005:201) as of significant importance with regard to the interrelationship between the family, church and school as societal relationships, and concomitantly with an ecosystemic theory (*cf.* 3.2).

SGBs therefore have to collaborate in partnership with the State on the one hand and the school (principal and educators) on the other hand (Naidu *et al.*, 2008:131; *cf.* 2.2). It is, accordingly, clear that overall school leadership is meant to be the responsibility of a joint effort by all role-players, namely the State, SGBs, principals, educators, learners, as well as the broader community.

In coherence with the above, Mhone and Edigheji (2003:3) view the concept of governance as referring to the manner in which State agencies are constituted, how they execute their mandate, how they create relationships within a society in general and how they fulfil the substantive aspects of democracy.

According to section 16(1) of the Schools Act (84/1996), the governance of every public school is vested in its governing body, while the professional management of public schools must be undertaken by the principal under the authority of the Head of Department. Although school governance is referred to by the Department of Education (1997:11) as determining the policy and rules by which the school is to be organized and controlled, it also entails assuring the quality of the teaching and learning at schools, as well as the management of resources and accountability for results (Serfontein, 2010:110).

4.3.1 School governance and inclusive education

Another dimension in South Africa that also needs to be taken cognisance of is the movement to an inclusive education system. According to the National Department

of Education (DoE, 1997:11), the professed goal of an inclusive provision of education would be to allow all learners to reach their full potential and *meaningfully* contribute to and participate in society throughout their lives. The latter includes that all learners are provided with equal opportunities to develop their talents and virtues (Nieuwenhuis, 2005:192). In this regard, Pillay and Wasielewski (2007:5) contend that an inclusive approach to education focuses on removing all barriers to learning and development and, as such, provides a shift from the traditional medical strategy approach to individuals towards a more integrated and ecosystemic approach to learners.

In keeping with the theory of whole school development, the Department of Education (DoE, 1997; *cf.* 3.3.1.1) emphasizes that holistic institutional development approaches are needed to ensure that supportive and inclusive learning environments are fostered in all centres of learning. In addition, support services are directed at moving away from only supporting individual learners to supporting educators and the system, in order to *recognise and respond appropriately to the needs of all learners, thereby promoting effective learning* (DoE, 1997:58) and so escape the isolation in which educators traditionally found themselves working.

Legislation on inclusive education also places emphasis on the training of education support personnel in order to focus on *supporting all learners, educators and the system as a whole so that the full range of learning needs can be met* (DoE, 2001:19). Trained personnel will form part of School-Based Support Teams. Pillay and Wasielewski, (2007:3) emphasize the fact that such teams should collaborate with SGBs to, *inter alia*, provide psychological support to learners and educators affected by HIV/aids alike, as their mental well-being is a major component of health in general, raising questions about their very purpose of living.

Of special importance to this study is the fact that SGBs are regarded as standing in a position of trust towards schools (84/1996: subsection 16(2)). They should promote the best interests of schools and strive to ensure their development (84/1996: subsection 20(1)(a)), as well as encourage parents, learners and educators and other staff members to render voluntary services to schools (84/1996: subsection 20((1)(h)).

Important provisions of the Constitution of the Republic of South Africa, Act 108 of 1996 include the fact that children have a right to basic health care services and social services (subsection 28(1)(d)), that everyone has the right to an environment that is not harmful to their health or well-being (subsection 24(a)) and to have the environment protected for the benefit of future generations through reasonable legislative and other measures (subsection 24(b)), and that educators have the right to freedom of trade, occupation and profession (section 22), as well as to fair labour practices (section 23). The right to an occupation and profession entails, as set forth by Joubert and Prinsloo (2001:144), that educators should meet certain requirements before and while teaching and that others should allow them to practise their profession. School environments should, accordingly, be places where educators as employees could enjoy employment benefits and learners could enjoy educational development (Mokgoro, 2007:v).

In obliging the State to create safe environments and, as such, securing, *inter alia*, ecological sustainable development for everyone, Le Roux *et al.* (2007:42) opine that the Constitution is thereby also placing emphasis on environments which respect the right of every individual to human dignity (Constitution: section 10). A school climate – for which SGBs are mainly responsible (*cf.* 1.1) - that respects all educational role players' dignity and therefore promote non-discrimination (Barry, 2006:153), is one that, according to Le Roux *et al.* (2007:42), sustains a working environment in which issues such as HIV/aids are not ignored or trivialized.

In addressing the legal foundation of ensuring school environments, in which a culture of human rights is promoted and fulfilled, Prinsloo (2006:306-307) posits that classrooms are the first and foremost places where a nation should start to raise its living standards, strengthen its democracy and build a sustainable human rights culture.

With specific reference to the right to safe and secure environments – an individual fundamental and justifiable human right, - Currie and De Waal (2005:521-522), however, state that environmental law in South Africa is often ineffective to enforce this right. This is unfortunate, as Basson *et al.* (2005:361) emphasize that the law places an absolute duty in this regard on the State and other employees. Currie and De Waal (2005:525) also show that the right to a healthy environment must be

defined broadly to include specifically the inter-relationships between humans and between humans and the natural environment. As such, it incorporates both socio-economic and cultural dimensions of these inter-relationships. The word *health* should accordingly be read to include both mental and physical integrity (2005:526), broadening the application of this right with regard to the effects of HIV/aids on learners and educators.

Establishing an environment conducive to healthy development is of extreme importance within an ecosystemic framework as it assumes that an individual educator and/or learner continuously interacts with his/her environment (*cf.* 2.3) and exerts mutual influence (McWhirter *et al.*, 2004:22). Du Toit (2006:13), similarly, shows that an environment can either eradicate or deepen a person's problems. Neither the person nor the environment is thus considered as the most important component in the development process, since both play equally important roles.

In combating the HIV/aids pandemic, the significant interaction between educators and learners' potential to prevent this pandemic from escalating and the total environment within which they find themselves must be acknowledged (Derbyshire, 2006:402). In this regard, Olivier *et al.* (2003:540) stress the close link between an environment and the establishment of social security as ecological protection is an expression of a basic interpersonal solidarity. Bender and Emslie (2010:64), correspondingly, indicate the importance of establishing effective disciplinary policies, create opportunities for meaningful participation and sound classroom management as these factors influence a school's overall psychosocial climate.

In line with their responsibility to create the overall ethos of schools (*cf.* 2.7) and the fact that the well-being of a society depends on its education system to prepare well-adjusted, responsible, well-educated young people, McWhirter *et al.* (2004:4) opine that schools must provide environments that maximize learning and minimize conditions such as HIV/aids that interfere with the learning process. In this regard, Bender and Emslie (2010:64) refer to a growing body of research suggesting that school connectedness is a powerful predictor of adolescent health and prevention of aspects such as HIV/aids.

The above should be aimed at while keeping in mind that a school's climate includes the total environmental quality within the school, consisting of four dimensions (Bender & Emslie, 2010:56), namely the ecology – the physical school buildings, as well as appropriate teaching and learning resources; the milieu - healthy social relationships between all role players; the culture – attaining democratic values; and the social system – cooperation in supporting educators and learners equally.

As public schools should be led and governed within this legislative framework, school leadership, followed by school governance will forthwith be discussed. A distinction between school management and governance will also be made.

4.4 SCHOOL LEADERSHIP

Leadership, according to Ribbins (2007:358), encompasses both administration and management duties. As the ones responsible for the carrying out of policy, values and philosophy through communal action, the leaders must be able to move men towards achieving set institutional goals. Emphasis is, therefore, placed on what leaders do and not so much on who they are. With specific reference to school leadership, Bush (2007:393) indicates that even though principals often operate while unaware of whether they are indeed leading or managing, it does not matter, as long as the nature of their work reflects their schools' milieu and, in particular, its needs at any given time. In underscoring the latter, Evers and Katyal (2007:377) highlight that leaders are not only responsible for setting goals, but also to do everything in their power to achieve them.

In order that leaders realize an organization's goals, House *et al.* (1999:184) put forward that they need to be able to influence, motivate, and empower others to contribute toward the values and successes of the organization they belong to. In line with the latter, Evers and Katyal (2007:378) define leadership as a process of influencing others to understand and agree about what needs to be done and how it can be done effectively, enclosing the process of easing individual and combined efforts to accomplish shared objectives.

To set and achieve goals within the ambit of South Africa's educational system undergoing a transformational process since 1994 (Steyn *et al.*, 2007:99), is, however, an enormous task. The latter, as accentuated by Naidu *et al.* (2008:6),

necessitates school leaders to understand the rising trends in education before they can guide schools to achieve the overall vision of education in this country.

Le Roux *et al.* (2007:43) and Prinsloo (2004:158) point out that leadership competencies need to be developed, empowered and improved at all levels at school. The Department of Education (2003:12; *cf.* 2.4), similarly, states that developing school leadership and management is one of the most, if not the most effective way of generating quality education at public schools (the ultimate aim of education; Schools Act 84/1996:Preamble).

Although Welman (2010:16; *cf.* 1.2 & 2.4.4) also recognizes the essentiality of developing school leaders, he argues that the appetite of schools' top leadership for change is most important. With the aim of acquiring sustainable educational change in mind, the same author avows that the meagre compiling and adopting of strategic governance policies, without a genuine acceptance thereof and commitment to implement and continuously adopt them, are insufficient. He also states that change (*cf.* 3.2) is not an uncomplicated process. It requires precise conditions. The most important condition is what he terms *cognitive adaptability* – the capacity of leaders and organizations to take on fundamental and at times a deep-seated shift in thinking (*cf.* 3.3.1). The latter includes reflective and far-reaching changes in thought, approach and action.

Lawrence (2008:38) share Welman's sentiment by stating that the transforming of individual leaders' values and attitudes is needed to enable them to pursue the community to collaborate and to motivate educators to take on work beyond their regular duties (*cf.* 1.1).

Singh *et al.* (2007:541; *cf.* 3.5), on the other hand, accentuates the importance of educational leaders becoming emotionally intelligent as they are continuously faced with sensitive and highly emotional problems, such as the HIV/aids pandemic that causes high levels of anxiety and stress. Emotional intelligence, according to these authors (2007:542), empowers leaders to recognize and appreciate the emotions of others, to manage their own emotions, to control emotions at schools, to exploit emotional information when problem- solving and to be able to articulate their feelings appropriately, thus leading to better caring skills.

Since people are the main resources of education (Bush, 2007:391) and an essential component of change, Pilon (2003:6) accentuates the importance of deliberate communication that supports dialogue and debate instead of designing, testing and delivering messages. This also includes sensitivity in placing information into dialogue and debate instead of instructive assigning of information from technical experts, focusing on social norms, policies, culture and a supportive environment instead of individual behaviours (*cf.* 1.1, 2.4, 3.2, 3.3 & 3.5). As such, educational leaders should discuss the best way forward in a partnership process instead of persuading people to do something as people who have been affected by incidents and play a central role, instead of technical experts in *outside* agencies directing and steering the process (Pilon, 2003:6).

Pilon (2003:6; *cf.* 1.1, 2.2 & 3.3.1.6), however, cautions that inventive projects by educational leaders to combat problems that may arise in order to develop ecosystemic conditions for all, enabling them to live better in a better world, depend on collaborative empirical learning and communicating processes within the socio-cultural learning fields, of a network of hope, dignity and self-reliance, consisting of individuals who think critically, communicate effectively, value diversity and act ethically (*cf.* 1.1, 3.2 & 3.3).

In this regard, Mbigi and Maree (2005:112-113) advocate the need to return to principles that strengthen a creation of trust, accountability, group care and loyalty. In order to obtain relationships built on trust, Prew (2007:458; *cf.* 1.3, 2.2, 2.4 & 3.5) accentuates the fact that school leaders need to acknowledge and respect their communities as well as to advance their involvement in school affairs by creating new physically, socially and mentally healthy environments. The latter is, as pointed out by Miah (2003:39), essential for enhancing teaching and learning at better schools (*cf.* 1.1) as well as by Evers and Katyal (2007:378), showing that school leaders should serve as anchors, provide guidance in times of change and be responsible for the effectiveness of their schools. Although the same authors (2007:383) caution that leadership is often a much overvalued construct as people tend to act together naturally, Bush (2007:391), to the contrary, recognizes that schools indeed require quality leadership in order to provide the best possible education for all learners effectively.

As the State is ultimately responsible for education in South Africa (Constitution, 1996: section 29), its top leadership role cannot be less by being a mere onlooker. The State should rather remain actively involved in order to create the right overall environment for other role-players to operate in and follow their objectives collectively (Schurink, 2010:508). This is essential, as change can only occur if the top leaders realize that it is needed and have the political will to follow it through.

According to Cloete (2004:620), the State carries the obligation to protect, regulate, develop, maintain and sustain its citizens amidst limited resources or to oversee the realization thereof for which it needs to prioritize its goals and set policy programmes in place to obtain them.

The State's active involvement is underscored by Adams and Waghid (2003:22) who point out that school governors require secured and organized public spaces in which they can come to understand their functions, create a sense of social unity through sharing ideas (a way of life) and building relationships of trust and harmony needed to accept the results of democratic decisions, as well as to reach self-governing individual choices. The State is, therefore, responsible for setting a public arena in which contentious issues can be resolved through dialogue rather than through pre-established forms of power (Kondlo, 2010:385). In this regard, Le Grange (2007:425), however, reveals that the State's role has changed from that of the overall provider of education to that of monitoring and regulating education provision.

These new roles of the State have, as avowed by Moloï (2007:467), brought along a fundamental shift for schools as they, within this new framework, have to move away from focussing on short-term planning and a culture of relying upon the State to becoming entities that can address the challenges of thinking and acting strategically in order to align school policies and practices to national legislation.

Since a definite line is drawn between the functions of school principals as the managers of schools and that of SGBs as the governors of schools, these two functions must be distinguished clearly.

4.5 SCHOOL MANAGEMENT VERSUS SCHOOL GOVERNANCE

As school management and governance are broad tasks, Manganyi (2001:33) urges SGBs to differentiate clearly between calculated decisions which are to be taken by them and decisions concerning the day-to-day management of schools which are to be taken by the teaching and management staff.

As previously indicated, section 16 of the South African Schools Act (84/1996) draws a clear line between school management (the responsibility of principals) and school governance (a function belonging to SGBs). In an attempt to differentiate between these two educational roles, Van Rooyen and Rossouw (2007:19) avow that while management refers to leading and directing (as well as to organizing and controlling, according to Singh (2007:547)), governance deals with the processes and systems by which an organization functions. In this regard, Steyn *et al.* (2008:121) mention that governance involves direction, vision and values, while management is concerned with control, effectiveness and organization.

In distinguishing between leadership and management at schools, Bush (2007:392) refers to leadership being linked to change, while management refers more to maintenance activities. As a result, leaders shape the actions of others by continuously setting goals in accordance with altering demands, while managers set out to uphold efficiency and effectiveness. Within the ambit of corporative governance, SGBs are, accordingly, required to formulate policies that are strategic in nature (they have a direct bearing on the character and direction of schools) in consultation with all role-players, while school management is obliged to implement and execute those policies (Minnaar & Bekker, 2005:570). Despite this definite distinction, the Department of Education (DoE, 1999:13), nevertheless, asserts that the advice from principals could be found to be extremely helpful to SGBs.

By applying the above to the demands presented by the HIV/aids pandemic, it is the responsibility of all educational leaders to set new goals for combating it, while principals *per se* should be responsible for preserving quality education amid this pandemic and for the practical implementation of policies at school level and in hostels (Barry, 2006:157). Kaselowski *et al.* (2010:336), moreover, points out that since any intervention and preventative programme for combating HIV/aids at

schools should be aligned with schools' overarching visions, it cannot be regarded as only a day-to-day operation managed by principals alone, but is rather a venture, being an integral part of the overall governance of schools for which SGBs must take responsibility and accountability.

Despite this distinction between leadership and management, the same author puts forward that these functions are of equal importance in striving for schools to reach set objectives.

Heystek (2007:491) argues that leadership refers to activities of leading others in order to get things done for which healthy relations, open communication, motivation and emotional intelligence are needed. Singh *et al.* (2007:547), moreover, add that leadership entails the establishment of trust, the illumination of the direction in which the school should be headed, the encouragement to take risks and the power to influence the behaviour of others. As such, leaders are more inclined to open communication and to risk-taking, while being less controlled by set policies. Principals, as school managers, on the other hand, are more often regarded as the curators and custodians of schools' visions, missions and values. Resulting from the latter, principals should influence others and provide the motivation, in a collaborative manner, to attain such visions and missions, while flourishing on change to lead schools towards their preferred purpose (Mathibe, 2007:537; *cf.* 1.1, 2.4 & 3.3.1.5).

The concept *management*, on the other hand, refers to better thought-out roles or approaches requiring school managers to work within the boundaries of rules, regulations and confines provided when planning and organizing to guarantee effective teaching and learning (Heystek, 2007:496). School principals as managers are, accordingly, more subjected to control by the State which is aiming at achieving a more uniformed quality education for all. The latter presents problems as it may lead to the State, especially, creating the illusion of empowering principals in theory while controlling and even dictating to them in practice. Bush (2007:393) also states that principals are, furthermore, swamped with advice from politicians, officials, academics and consultants – which is not necessarily underpinned by values, but rather set to attain own politically enthused intentions - about how to lead and manage their schools.

Despite clear guidelines concerning the functions of school managers and governors, Heystek (2007:491) cautions that the concepts of school management and governing are often not separable in practice and, therefore, used by many as overlapping concept. The latter, however, contribute to confusion of the roles principals have to play in practice (Ribbins, 2007:353).

On the other side of the spectrum, Lewis and Naidoo (2004:106) also refer to many SGB members acting beyond their statutory functions, and thus trespassing on the terrain of school management, leading to immense tension and unhealthy relationships between SGB members and educators.

To conquer these problems, Lewis and Naidoo (2004:100) recommend that the roles of school level actors be re-defined by addressing power structures and conventions in order to allow for the authentic participation of communities in the governance of schools. It is equally important, as pointed out by Schurink (2010:501), that each role-player recognizes the roles he/she has to play and has sufficient knowledge regarding his/her responsibilities, rights, relationship and associations that shape his/her involvement. The same author also links the importance of partners showing respect and appreciation for one another's knowledge, capabilities, core values and skills.

4.5.1 Collaboration between school managers and school governance

Although school managers and governors theoretically play distinct roles, collaboration between them is needed to ensure that schools achieve their goals and objectives. In practice, SGBs are, for example, required to work with principals, School Management Teams and other role-players to decide how schools would expand to uplift their standards and establish policies, plans, targets and procedures which have been formulated within the school to support their development (Schools Act, 84/1996: section 20; *cf.* 1.3, 2.2 & 3.3.1.6).

Section 20(1)(e) of the Schools Act (84/1996), correspondingly, obliges SGBs to support principals, educators and other staff members in the execution of their professional duties. Principals, on the other hand, are obliged to provide guidance to educators, learners, parents and other role-players on the best approaches and practices that would assist in the achievement of the vision of schools (Mathibe,

2007:537-538). Principals are, moreover, as outlined by Joubert (2007:40), required to support and assist the members of their SGBs, while, according to Evers and Katyal (2007:378), carrying the obligation to work in close collaboration with educators too. Supporting each other is important as Lawrence (2008:34) stresses the fact that educators with little or no motivation cannot remain committed and dedicated to the teaching profession. Bush (2007:391) adds that quality education requires well trained and committed educators who, in turn, need the leadership of highly effective principals and other educational leaders.

With regard to the support SGBs must provide, the Department of Education (DoE, 2004) opines that SGBs can best support educators by infusing the values of honesty, loyalty, enthusiasm, willingness, wisdom, insight, commitment and dedication into the management and leadership of schools.

As the governors of schools, SGBs also have the daunting task of overseeing school management. It is their responsibility to ensure that schools are effectively managed as they are, in due course, accountable to all educational role-players (Bouwman, 2010:26). Accountability entails, according to Wagner (2005:142), an obligation to give account. This involves reporting and explaining or even justifying education activities. It is with the latter in mind that Phillips (2010:36) emphasizes the need for information at schools to be transparent, *i.e* timeously and lengthily available to all education role-players as well as easily understandable. This will lead to problems being avoided or at least being identified and timeously solved. The importance of transparency is also underscored by Kaselowski *et al.* (2010:334) who point out that informed decision-making can only take place if the correct information is accessible to all concerned.

Despite the importance of cooperation, Bush (2007:398) refers to SGB members struggling to cooperate with SMTs due to a lack of communication and the failure of SMTs to implement SGB made decisions. SMTs, on the other hand, complain about SGB-members never being available to them, as well as confusion over the roles SMT and SGB members have to play at schools.

In highlighting the importance of cooperation between school management and governance, Steyn *et al.* (2008:99) put forward that teamwork will inevitably lead to a

communal final product, greater than the sum total of member's individual contributions.

Such a final product should, as outlined by Thornhill (2004:474), ensure that schools as public institutions function efficiently and effectively. These conditions are non-negotiable as public schools within an ecosystemic framework are obliged to utilize public resources for the advantage of society in general or a particular school community in particular.

After clearly outlining the functions belonging to school managers and school governors respectively, school management and school governance *per se* need further discussion.

4.6 SCHOOL MANAGEMENT

In order to move away from previous authoritarian structures in South African education to more dynamic, inclusive and participatory management systems (Mestry & Singh, 2007:482), the concept of School Management Teams (SMTs), consisting of principals, deputy-principals and heads of department, was introduced. It is the duty of these teams, being in a better position to determine the particular needs of a school, to manage public schools under the leadership of principals professionally. The latter includes that responsibility is taken for everything pertaining to the provision of quality education, ranging from supervising human resources and the curriculum, to running extra-mural school activities (Van Rooyen & Rossouw, 2007:20). It could, therefore, be deduced that SMT members should provide guidance and leadership with regard to the development of policies, which, in turn, could assist in achieving the objectives and vision of a school.

As the leader of such teams, it is a core function of principals to decide on the aims of their schools. This is an extremely important task as schools' aims constitute the heart of education management. To obtain the latter, Evers and Katyal (2007:379) indicate that principals must work together with educators to define educational objectives, set goals and provide the necessary resources for learning, as well as to create new learning opportunities. In also pointing to the important role of principals, Smit (2007:55) accentuates that school safety leadership starts at the top. In line this, the same author urges school principals to spend time outside their offices,

staying in tune and in touch with their personnel, learners and communities. Singh *et al.* (2007:542; cf. 1.1, 2.4.2.1, 3.3.1.5 & 3.5) identify the creation of collaborative educational environments in which collegiality would flourish, as an important managerial function.

School principals are, however, not allowed to do as they wish. They are required, as set out by Bush (2007:391), to be centrally concerned with the overall purposes and aims of education in South Africa. Principals are, therefore, expected to function within a framework of control systems (Heystek, 2007:491). National educational purposes and aims must be taken cognizance of when managing schools as they offer direction to all managerial actions. Such national set aims also serve to contest the danger of *managerialism*. The latter refers to a scenario where school managers' act in their own best interests at the expense of the overarching educational purposes and values (Bush, 2007:391) and to the detriment of learners. In line with this, McLennan (2000) puts forward that school management merely serves as a mechanism through which the State aims at achieving compliance with policies and rules, as well as with effective service delivery (quality teaching and learning).

McLennan (2000), however, cautions that managing schools is by no means an easy task. It is rather a set of complex activities incorporating strategic management (defining the normative and regulatory framework for structuring and planning), pedagogic management (establishing the nature and objectives of the educational process), as well as operational management (taking care of the daily functioning of schools which involves policy, planning, coordination as well as human resource and financial management).

Management is also understood by Ribbins (2007:357) to include processes of securing decisions regarding the activities schools will undertake and the mobilization of human and material resources to execute them successfully. In order to empower educators, as the main human resource in education, Singh *et al.* (2007:546) propose that principals transfer ownership regarding teaching and learning to educators within an environment conducive for them to take up such a responsibility and within the parameters of shared objectives. As such, educators could be fully engaged in setting and achieving mutual benefits for all.

Heystek (2007:491), moreover, accentuates the close link between school management on the one side, and quality education, as well as whole school improvement on the other side. In this regard, Maree (2008:67) opines that management needs to focus on improving learning opportunities for all learners and on creating physical as well as emotionally safe environments in which learners can reach their full potential. The latter includes, as pointed out by Singh *et al.* (2007:542), environments that foster an open flow of thoughts; stimulate critical reflection about analyses of ideas, problems and solutions; create notions of what is universally acceptable as being in the best interests of all and develop a concern for the rights and dignity of all involved.

School managers are also expected to assume greater responsibility for the management of human resources – those who work at their schools. As educator morale and motivation have been wretched in the many inferior physical school environments in South Africa, of which the HIV/aids pandemic is but one, principals are faced with enormous challenges when managing schools (Moloi, 2007:469; *cf.* 2.4 & 3.2). In this regard, Singh *et al.* (2007:542; *cf.* 1.1 & 2.2) recommend that principals need to provide support, preparation and guidance for educators to fulfil their calling.

To carry out their responsibilities effectively, Van Rooyen and Rossouw (2007:19), as well as Prew (2007:447), stress that school managers need to adopt management styles based on openness, confidence, inclusiveness, cooperation and participation with the best interests of schools and learners in mind while focusing on developing systems of accountability and responsibility.

Mestry and Singh (2007:480; *cf.* 3.2), moreover, stress that principals are expected to adopt strategies which acknowledge that new issues may arise from different parts of schools and be resolved through complex interactive processes. As such, principals should be able, as avowed by Singh *et al.* (2007:543), to mediate successfully between internal harmony and external needs with the aim of achieving a dynamic balance. Mathibe (2007:523), in addition, calls for principals to develop a multi-strategy approach to enable educators, which he regards to be of immense value for the success of education, to fulfil their roles effectively. For this, the same author (2007:524; *cf.* 3.2) proposes that principals be well qualified (*i.e* abreast of

educational development) in order to understand the notion of the optimum utilization of educators' potential.

Schurink (2010:500; *cf.* 3.3.1.3) shows that educational partnerships should continuously be strengthened through dialogue, reflexivity, shared leadership styles, joint actions and the mutual benefits they share. As such, Van Rooyen and Rossouw (2007:19) accentuate the imperativeness of moving from adversarial relationships characterized by a high degree of mistrust, intolerance, polarization and alienation to unity in diversity that embeds a high degree of mutual trust, transparency, cooperation and cultural tolerance. Through adopting such management styles, Du Plessis (2008:118) indicates that legitimacy and public acceptance, as well as trust will be attained which are, as set forth by Prew (2007:459), of paramount importance. These qualities are especially needed when dealing with an extremely sensitive and secretive issue such as the HIV/aids pandemic (Lawrence, 2008:38).

Although Singh *et al.* (2007:543; *cf.* 1.2, 2.4.2.1, 3.3.1.3 & 3.5) acknowledge the importance of good leadership skills among school principals as an essential element of education success, they argue that modern schools, challenged by complex social problems, require that focus should rather be placed on collaborative (collegial) leadership and a sense of community in which leadership roles are shared.

With specific reference to shared values, mutual benefits and diversity, Du Plessis (2008:116) cautions school managers not to make far-reaching decisions for their school community as contemporary democratic concepts such as consultation and invitation of different opinions are important to consider.

Despite the importance of implementing democratic principles at schools, and numerous attempts to provide for more bureaucratic structures, research conducted by Prew (2007:460) indicate that too many principals continue to utilize leadership styles which are centralized, hierarchical, authoritarian, rule-driven and secretive. As a direct result of such styles, schools are found to be not functional and undeveloped. The latter can also be ascribed to the fact that the style of leadership plays a crucial role in ensuring lasting relations with all role-players aiming at educational improvement (Mestry & Singh, 2007:483). Kondlo (2010:384), moreover,

argues that the fulfilment of South Africa's democracy is hampered as it is encircled by an enveloping leadership crisis.

Lewis and Naidoo (2004:100&106), correspondingly, point towards principals tending to frame parental involvement within the boundaries of what they regard as appropriate or allowable. In practice, consultation processes are, therefore, often managed solely by principals, disregarding other role-players' equal participation opportunities which leads to consensus, as the basis of decisions, being more illusionary than real.

The research results of a study done by Karlsson (2002:331), in addition, signify that principals dominate SGB meetings due to their powerful positions, educational expertise, accessibility to educational information and the fact that they are the ones responsible for executing decisions. Lewis and Naidoo (2004:105), moreover, contend that principals and educators do not always value participation or democratic decision-making at schools, thus lacking social cohesion (Kondlo, 2010:384). Resulting from the latter, parents are discouraged from participating and even manipulated and dictated to by principals.

Pengpid *et al.* (2008:48), to the contrary, show that educators who do value parental participation often struggle immensely in obtaining such participation, as most parents do not attend meetings and never react positively to any attempt at communicating with them. Research conducted by these authors (2008:55) on parental involvement in sex education in an attempt to combat the HIV/aids pandemic, also signify that even if parents do respond, they regard combating this pandemic as the responsibility of educators as they experience difficulty in discussing sex-related issues with their own children.

With regard to the facing of problems such as the HIV/aids pandemic that present enormous challenges to school leadership, Lawrence (2008:34) avows that school principals and SGBs play an agency role to lead schools from conflict zones to community growth by winning the trust of the community and building support systems.

To fulfil this role, the same author indicates the importance of principals having the necessary self-confidence to build new relationships between their schools and the

community around the crucial issue of HIV/aids. Mestry and Singh (2007:483), similarly, opine that principals need to be developed to have greater confidence, a stronger sense of assurance and the expert knowledge to undertake important managerial tasks. Naidu *et al.* (2008:93; *cf.* 1.1), moreover, highlight the need for educational role-players to develop expert skills in many key areas, including HIV and AIDS support, varied management and the renewal of the dedication (*cf.* 1.1 & 2.4.4) to teaching and learning to convert schools into settings that can deal with changes effectively. In underscoring this, Pilon (2003:6) points towards the necessity to focus on man as being a caring person instead of regarding man as the central figure, when dealing the HIV/aids pandemic.

In line with the above, Evers and Katyal (2007:378) suggest that principals with the potential to encourage educational achievement, should redefine their roles to become the primary learners in communities striving for excellence in South African education.

4.7 SCHOOL GOVERNANCE

School governance, according to Joubert and Prinsloo (2001:42), entails determining the policies and rules by which a school is organized and controlled. As such, it includes ensuring that the rules and policies are aimed at protecting learners' right to education and are carried out effectively in terms of the law and the budget of the school. McLennan (2000) shows that such policies are important as they provide the context and framework for governance relationships, thus, framing the structural ways in which schools operate and the processes of decision-making.

The duties and responsibilities of SGBs, according to the law, are to govern schools (Schools Act, 84/1996: section 16(1)) and to determine the mission and overall conduct of the school with a view to promoting high standards of educational achievement in the best interests of the school (section 20(1)(a)). Other functions include determining schools' admission policies, setting language policies, recommending teaching and non-teaching appointments, managing finances and conducting fundraising. Simultaneously, significant decision-making responsibilities have been delegated from central government to self-governing school communities.

As a reason for requesting schools to govern themselves, Mncube (2009:84) posits that the distinguishing needs of each school can best be solved and met at local levels with more resoluteness. As agencies of the State, Lawrence (2008:34) points out that SGBs could lead schools from conflict to community growth by attending to the distinctive needs of their school communities. In extending this concept, the same author stresses the importance of SGBs being able to win the trust of their communities when building on, for example, unique HIV/aids support systems for the school and the community surrounding it.

Principals, as *ex officio* members of SGBs, together with other members comprising of parents (majority members), learners, educators and non-teaching staff, are responsible for the implementation and monitoring of what has been agreed to by SGBs and for the managing and day-to-day running of the schools (Schools Act, 84/1996: subsections 23(1)(b) & 16(3)).

SGBs also have a continuous role to play in assessing the quality and standard of what has been achieved. To do this, SGBs must receive reports on the results of implementation and monitoring from Schools Management Teams. On the basis of these reports, SGBs then review their policies, plans, targets and procedures and agree on the changes needed to secure further improvement of schools (Schools Act, 84/1996: section 20).

The strategic role of SGBs applies to all the particular legal responsibilities of governing bodies for the school budget, the curriculum, staffing and a range of other areas of school activities (Schools Act, 84/1996: section 21 – allocated functions).

From the foregoing paragraphs, it is clear that the role of SGBs is to provide overall guidance on the direction and character of schools, to ensure that schools fulfil their legal obligations, to hold schools accountable for the quality, standard and effectiveness of teaching and learning they provide, and to ensure that adequate plans are formulated and that targets and objectives are achieved (Serfontein, 2010:108).

Governing schools is, however, a complex issue. In this regard, Mncube (2009:85), for instance, indicates that it remains to be a political activity to which power relations

are a central issue. The latter is due to the fact that school governance deals with the location and distribution of important, but scarce resources.

It is with the above-mentioned in mind that Pilon (2003:6) cautions that aspects such as school growth, power and wealth must acquire new meanings as a concentration on the accumulation of wealth to the exclusion of other components of the development process such as safety, health, justice, equity and ethics has led to the deeply troubled mega-cities of today.

In line with this, Serfontein (2010:104), Van Rooyen and Rossouw (2007:12) as well as Schmoker (1998:54) call on SGB members always to remember that their new functions and powers come with a price, as they will be held accountable to those who established and fund it, namely the parents, the wider community it serves and the Department of Education for improving the overall quality of educator and learner performance. In this regard, Beckmann (2009:138) points out that accountability naturally follows the exercise of power, the use of resources and the implementation of policy. Accountability is, as such, inextricably linked to democratic management and other related concepts such as participation, decentralization, empowerment and transparency. In view hereof, the empowerment of SGBs entails, as set forth by McLennan (2000), the challenging of perceptions and the developing of new strategies.

Miah (2003:39) stresses that, schools should attain a new kind of normality, not by trying to mend educational role-players, but by enhancing them. Adams and Waghid (2004:22), concomitantly opine that SGB members should firstly be encouraged to create opportunities for themselves and others in order to give voice to what they have discovered about themselves and the world and to persuade others of its worth. This, by implication, means that SGBs should be developed under conditions in which freedom of speech and association can, according to the same authors, ensure that individuals make autonomous choices, as well as share and evaluate their experiences - elements highly valued by democratic governance. Mncube (2008:79), moreover, proposes that ample devices are adopted to regulate social arrangements in the fairest manner to the profit of all.

4.7.1 School governance within South Africa's democratic dispensation

Since the 1994 elections in South Africa, this country aspires to move away from an authoritarian past to a democratic future. In line with this objective, the Constitution of the Republic of South Africa (1996) calls for an indisputable commitment to democratic principles such as representativeness, participatory democracy, accountability, transparency and wide public involvement in shaping its future. As such, this new democratic dispensation is based on both representativeness and participation (Lewis & Naidoo, 2004:102) which need, as set forth by Kondlo (2010:385), to be effectively combined in order to improve the value of representativeness through the assistance made possible by the participation process.

Within the ambit of the national movement to democracy, the previous centralized education system was replaced with a more decentralized education system. It is within this new system that the State aims at improving the efficiency of the entire education system, in particular, as well as extending democracy by promoting broader participation (the cornerstone of democracy) in educational decision-making. To achieve the latter, local school governance structures were established, thus placing the governance of schools into the hands of the parents (Schools Act, 84/1996: Preamble). With reference to the latter, Adams and Waghid (2003:17) say that the main aim of the Schools Act is to convert public schools into sites of dynamic community association.

Participation by the community *per se* is defined by Schurink (2010:491) as *the creation of a democratic system and procedure to enable community members to become actively involved and to take responsibility for their own development, to share equally in the fruits of community development and to improve their decision-making power*. Through the latter, the State, on the whole, according to Lewis and Naidoo (2004:104), aims at advancing the democratic transformation of the whole society.

By placing emphasis on the education sector, Evers and Katyal (2007:378) suggest that the new leadership roles allocated to principals and SGBs should be perceived as a transformational power process within school systems. The same authors,

correspondingly opine that the concept of education leadership is currently interwoven with activities for change. The latter is important for leaders in the sphere of education to stay abreast of development as Le Grange (2007:424) points out that the South African education landscape remains complex and ever changing.

Since schools are important in understanding the complexities of changing environments, Evers and Katyal (2007:379) opine that school leaders are perceived as change agents. They subsequently need to be empowered to cope with change and be motivated to commit to their new roles as democratic change agents by developing the social and intellectual capacity of all learners. It is, moreover, necessary that leaders are capable of guiding educational role-players to overcome systemic resistance to change (Cloete, 2004:638). In this regard, Welman (2010:17) urges school leaders to identify with and understand points of resistance and find ways to navigate around them.

Within the ambit of the above, Mncube (2008:79) argues that schools must be organized along democratic lines, taking cognizance of the fact that democracy is best practiced in democratic settings. Reasons for the latter are that such settings encourage participation justified by democratic principles (Bush, 2007:397), allow for freedom of expression, a sense of social justice and fairness to prevail and encourage the simulation of democratic approaches. The latter, in turn, permit the nurturing of qualities such as active participation, improvement, cooperation, self-government and inventiveness. In line herewith, Pengpid *et al.* (2008:58) indicate that schools need to adopt structured frameworks, enhancing the involvement of all educational role-players if they wish to obtain optimal participation in school matters.

According to Schurink (2010:491), community participation (the heart of a community's existence) is one of the key characteristics of an empowered community as it *binds* people together. In order to empower a community, Bush (2007:397) proposes processes that increase personal and interpersonal skills and political power, enabling individuals to improve their existing life conditions. The latter is important against the background of most school communities being extremely poor and lacking the necessary education levels to, as shown by Adams and Waghid (2003:18), enact their roles as school governors, leaving them with an abstract freedom to participate, which could be considered meaningless. As such,

empowerment is needed as it has the ability to increase motivation and energy levels as well as to enhance problem-solving skills, decision-making power, self-esteem, self-efficiency and self-determination among community members. In underscoring the latter, Kondlo (2010:389) opines that the starting point and foundation to good governance lie in the accomplishment of empowered participatory democracy.

In line with the above, Singh *et al.* (2007:543) accentuate the fact that schools need shared leadership which not only involves leadership behaviours that build willing followers who commit themselves to the objectives of schools, but also empowers followers to achieve those objectives by becoming leaders in their own fields of expertise.

As democracy in its widest application to South Africa, however, falls beyond the scope of this study, attention is forthwith mainly devoted to the ways and means available at schools to identify and address the distinctive needs of school communities, mechanisms available to acknowledge the contributions of parents and learners and the processes to integrate the views held by the different educational role-players into schools' missions, policies and actions ensuing from community deliberations and resolutions.

To fulfil the objectives of democracy and to take up the challenge of being both representative and participatory, the Schools Act (84/1996: section 23) provides for SGBs of which members should consist mostly of individual parents being democratically elected by the school community. This is in line with the principle of cooperative governance, envisaging objective, independent and effective decision-making processes (Bouwman, 2010:26). SGBs, consequently, function as fully elected representative bodies acting on behalf of public schools when required to make decisions regarding their governance functions (Joubert & Prinsloo, 2001:43). Chairpersons of SGBs should, accordingly, be independent members who enjoy the trust of the parents who elected them and are therefore capable of setting an ethical tone for other members and providing overall leadership (Bouwman, 2010:27).

Despite the recognition of relationships built on trust, Berkhout's (2007:417) research on the South African education discourse has indicated an overall lack of notions such as acceptance, collegiality and morale, commitment to individual development,

respect, trust and encouragement. These findings are regrettable in view of the fact that education remains to be a dynamic person-centred profession in which collaboration, sharing, social justice and mutual trust are non-negotiable.

It is, in addition, important to acknowledge that senior learner participation in SGBs is guaranteed by the Schools Act (84/1996: sections 11 & 23(2)(d)). In this regard, Potts (2005:149) emphasizes that all learners deserve to be in an environment where they can participate and communicate with peers, educators and staff who challenge them academically while meeting their social, emotional and cultural needs, and where they are justly included in every aspect of school life.

In order to adhere to legislative provisions, Mncube (2008:77) recommends that spaces should be created for learners to participate sufficiently in SGBs in order to allow them to exercise their right to participation, thus engaging fruitfully in deliberations dealing with school governance.

Despite the fact that SGBs mostly comprise of democratically elected members, such bodies are, nevertheless, required to take cognizance of the broader community when governing schools. As a reason for the latter, Thornhill (2004:474) points out that any democratic governing function has to attach weight (or values) to the unique needs it identifies in its community. Another reason is set forth by Lewis and Naidoo (2004:102) as being the fact that the whole idea regarding the devolution of power is that more power should fall in the hands of individual schools, as well as in their school community within a democratic dispensation. Accordingly, the concept of representativeness revolves, as argued by Adams and Waghid (2003:18), around responsible representation, implying that SGBs are accountable to the people who voted for them.

To underscore the above, Lewis and Naidoo (2004:02) show that participation does not merely extend to the right to elect representatives, but also the important right to influence decisions affecting them equally. As such, SGBs have to determine the views and intensity of the demands of their broader parent community. Thus, when school policies are formulated, SGBs are obliged not only to obtain expert advice from the Department of Education, but also to consider and value the inputs from the communities they serve. This is in line with Mncube's (2008:79) view that a

democratic education system cannot be promoted without the democratization of the broader society.

The adoption of democracy at legislative level will, therefore, remain a theoretical theory if South African citizens are not trained how to act within this new dispensation in order to become community change agents. As school governance as part of a broader democratic movement is a new terrain for the overwhelming majority of communities, Adams and Waghid (2003:17) recommend that all school governors be well educated on what the principles of democracy entail in general and trained thoroughly on the imperatives of democratic school governance. A dedicated commitment to democracy and joint decisions are moreover needed as participation *per se* will not guarantee the satisfaction of needs (Cloete, 2007:391). Without commitment, Kondlo (2010:385) cautions that democracy will stagnate or even be reversed in future. In line with this, Schurink (2010:510) proposes that a totally new paradigm regarding development and empowerment, focusing on community participation and emancipation, be employed.

In recognizing the need of training school governors, the Schools Act (84/1996) provides for the enhancement of the capacity of governing bodies by obliging the various Heads of Education Departments to establish initial, as well as ongoing training programmes for SGB-members, in order to fulfil their duties effectively.

Despite the latter, research conducted by Adams and Waghid (2003:18) revealed such training programmes to be highly deficient, thus retarding school governors' chances of self-development – a critical prerequisite for the effective functioning of SGBs. Lewis and Naidoo's (2004:103) research results, similarly, indicate that SGB-members do not understand the roles required of them, which generally leads to confusion, tension and conflict.

As a direct consequence of poor training opportunities, school leaders lack the necessary values and skills needed to realize full democratic participation at schools. In this regard, (Mncube, 2008:89) views his concern about the concepts of representativeness and debate being only theoretically open and fair. The latter is, according to the same author, a result of structural and behavioural factors in practice inhibiting the extent to which SGBs operate.

4.8 CONCLUSION

Governance implies a linear strategy to change, thus emphasising collaboration and participatory democracy. In line with this the Constitution calls for cooperative governance while the Schools Act obliges the State and SGBs to work together as equal partners. Since democratic participation necessitates the active involvement of all role-players in governance actions, it is essential that SGBs ensure that the voices and views of their school communities do not remain absent from school governance.

Section 16 of the Schools Act clearly distinguishes between the management and governance of schools. Although collaboration between principals (school managers) and SGBs (school governors) is important, it is evident that SGBs have autonomy to govern schools in the best interests of learners. As part of their functions, SGBs are responsible for the overall ethos of schools and the compiling of, *inter alia*, HIV/aids Policies.

While addressing ecosystemic theories, Chapter 3, highlighted the importance of the interdependence (*cf.* 3.2) and interactions between various systems and their influences on one another. This underscores the significance of wider parental (part of the micro-system) and community involvement (part of the exo-system) in the governance of schools (part of the meso-system) to guide them to become social contexts (*cf.* 1.1) in which the youth can build their dreams and formulate their plans concerning their future.

Governing schools in a contemporary South Africa, crippled by the HIV/aids pandemic, is however no easy task. To illuminate this, the next chapter presents the data obtained during the course of this study with regards to, especially, the perspectives held by current SGB members to overcome the challenges of this pandemic.

CHAPTER 5

EMPIRICAL RESEARCH DESIGN

5.1 INTRODUCTION

While Chapter 1 provided an overall orientation to the study by, *inter alia*, offering basic information on the research conducted, this chapter explains the qualitative, empirical design and methods followed in more detail. The research methodology employed is discussed in order to consider and explain the logic behind the research methods, procedures and techniques used as tools.

Since the quality of any researcher`s findings directly depends on the methodological procedures followed (Mouton; 2009:174), this chapter includes an in-depth discussion and justification of the research methodology used in this study.

5.2 RESEARCH METHODOLOGY

Research entails a process aimed at obtaining and expanding scientific knowledge (Welman *et al.*, 2010:2&5). As a process, it consists of various objectives, but specific, methods and procedures. Scientific methods are, for example, used to attain valid knowledge of human behaviour in a variety of contexts. In this regard, the methodological dimension of research includes specific methodologies, approaches, methods, techniques, procedures and instruments employed by the researcher to obtain his/her set goals (Mouton, 2009:36).

During the course of this study, a disciplined inquiry (McMillan & Schumacher, 2001:10) was conducted and reported on in order to painstakingly examine the effects of the HIV/aids pandemic on the South African education system. As such, a particular set of measured observations, relevant to the study, were selected from infinite possibilities. In line herewith, an ecosystemic approach was employed as a source of principles and for the canons of evidence used by the researcher. Education, as an exciting field of inquiry, was selected as the events, phenomena, people, processes and institutions constitute the raw materials for inquiries of many kinds (McMillan & Schumacher, 2001:11).

5.2.1 Research paradigm

This study followed a social constructivist paradigm with a qualitative approach (Creswell, 2009:8; *cf.* 1.6.1) in order to comprehend how individual SGB members in everyday school settings construct meaning and explain events of their world. A social constructivist paradigm was followed as the HIV/aids pandemic was recognized as a multifaceted, socially constructed phenomenon with multiple realities. In this regard, Mouton (2009:105), *inter alia*, shows that applied research takes a certain problem existing in the social world as its point of departure with the ultimate aim of solving such a social problem or to make a contribution to real-life issues.

An anti-positivist (qualitative) approach was followed in this study as the researcher agrees with Welman *et al.* (2010:6) who believes that it is inappropriate to follow strict natural-scientific methods when collecting and interpreting data concerning human behaviour. Within the framework of this approach, a phenomenological study was undertaken with the purpose of understanding human behaviour from the perspective of the people directly involved (the attainment of subjective data) and not to find general laws of relationships that apply to all people at all times. Accordingly, it was not the aim of this study to describe the phenomenon at hand, but rather to describe the way in which the people experienced the phenomenon studied (Welman *et al.*, 2010:7).

The aims and assumptions followed in this study, *per se*, fits into a social constructivist paradigm, frequently combining interpretivism with qualitative research (Creswell, 2009:8; *cf.* 1.6.1) which assumes that human life can only be understood from within, that social life is a distinctively human product, that the human mind is the purposive source or origin of meaning, that human behaviour is affected by knowledge of the social world and that the social world does not exist independently of human knowledge (Welman *et al.*, 2010:8; Mouton, 2009:7; Nieuwenhuis, 2007a:59).

5.2.2 Research design

A research design serves as an overall plan or structure on how to execute a formulated research problem in order to maximize the validity of such research findings (Mouton, 2009:175).

Since qualitative research, in contrast to quantitative research following a particular approach, uses a holistic approach (Welman *et al.*, 2010:9), it was employed in this study. The latter was done with the overall aim of this study in mind, namely to study the HIV/AIDS pandemic by using an ecosystemic framework for which a holistic approach (*cf.* 1.2) in line with the characteristics of system-thinking (*cf.* 3.3.1), placing emphasis on a shift from the parts to the whole, was needed.

A governance strategy to combat HIV/aids was accordingly scrutinized by taking cognisance of the role all educational role-players need to play in order to ensure the success of such a strategy.

The theoretical lens, through which this research was contextualized, thus includes the typology of HIV/aids combined with an ecosystemic perspective, which is an integration of systems as well as ecological theories. In the context of this study, the school with its SGB, as a bonded system, was regarded as comprising of a set of units with the capacity to interact continuously within the scope of the school-, family- and community environments. The fact that schools influence and are influenced by all the different parts of a system was also taken into consideration (*cf.* 3.2).

With the above in mind and the prospects of using an ecosystemic framework, a qualitative research design (*cf.* 1.6.2) or – theoretically speaking - research approach (Welman *et al.*, 2010:188) - was selected, as it encompasses an inquiry process of understanding, allowing the researcher to develop a complex and holistic picture, to analyse words, to report the detailed views of participants, and to conduct the study in a natural setting (Ivankova *et al.*, 2007:257). It also assisted the researcher in his attempt to understand people in terms of their own definition of the world, and thus to obtain an *insider perception*.

By endeavouring to focus on *insider* rather than *outsider* perspectives, a qualitative research design (also referred to as a naturalistic research design) assisted the

researcher to emphasize the natural and subjective components of his selected sample (Mouton, 2009:130; *cf.* 1.6.2). In following such a naturalistic perspective, the researcher was, furthermore, placed in the position to identify accurately the *native or indigenous* concepts inherent in his subjects which affected their views, perceptions, attitudes and behaviours with regard to HIV/aids. It was only afterwards that the researcher attempted to integrate his obtained data within a framework of existing social scientific theory.

What is said, thus far, corresponds with Nieuwenhuis (2007a:51) pointing out that a qualitative research design is concerned with understanding the processes as well as the social and cultural context which underlie various behavioural patterns by interacting with and observing the participants in their natural settings while focusing on their individual interpretations. In underscoring the latter, Welman *et al.* (2010:9; *cf.* 1.6.2) point out that researchers are enabled by a qualitative research design to work successfully with the dynamic and changeable nature of reality.

It also corresponds with Fouché and De Vos (2009:93), arguing that a research design focuses on the logic of research and on the end product. As a primary objective (*cf.*1.4), this study also endeavoured to determine the nature of a governance strategy which can combat the HIV/aids pandemic successfully at schools and make suggestions for developing a strategic governance strategy which can be adopted by schools in order to eco-systemically deal with the HIV/aids pandemic. In this regard, Fouché and De Vos (2009:93) put forward that such studies are more often of a qualitative, contextual rather than a quantitative nature.

5.2.3 Mode of inquiry

From a qualitative perspective within an social constructivist paradigm (*cf.* 1.6.1), a phenomenological case study (Fouché, 2009b:269; *cf.* 1.6.3) as interactive strategy of inquiry, was employed to research real-life objects (human behaviour, schools as social organizations and a social intervention programme) and to explore the details and meanings of experiences encountered by them in reality (Bender & Emslie, 2010:56). As such, it assisted the researcher to identify important patterns and themes in the data that could be employed in evaluating (McMillan & Schumacher,

2001:25) and suggesting important elements of an effective governance strategy to combat HIV/aids at schools.

While addressing different strategies followed by qualitative researchers, Fouché (2009b:268) points out that such researchers almost always develop their own designs best suited to their research as they go along, using one or more of the available strategies/methods or tools as an aid or guidance.

The term *phenomenology* has, however been so widely used that it's meaning has become confusing. As a result, phenomenology is viewed by some as a paradigm, while others refer to it as a philosophy or as a perspective. It is even often regarded as being synonymous with qualitative methods or naturalistic inquiry (Kahn, 1999:120). McMillan and Schumacher (2001:36), as well as Creswell (2009:13) opine that the term phenomenology incorporates both a philosophy and method that can be used to identify and understand lived experiences. In this regard, Welman *et al.* (2010:192) explain that phenomenological researchers aim at letting a phenomenon speak for itself.

In its broadest sense, phenomenology thus refers to a person's construction of the meaning of a phenomenon as opposed to the phenomenon as it exists external to the person. The phenomenon experienced or studied may, according to the same authors, be an event, a relationship, an emotion, or even an educational programme. In the area of achievement motivation, Bourque and Gale (2008; *cf.* 1.6.3) describe the importance of understanding the individual's phenomenological perspective by stating that *the individual's personal and subjective self-perceptions are important for future achievement behaviours regardless of the accuracy of the perceptions in terms of their match to grade.*

Phenomenology is defined in this study as a research method that attempts to understand the participants' perspectives and views of social realities with regard to HIV/aids and the means of governing schools effectively amid this pandemic.

De Cock and Hipkin (2003:661) refer to Tuckman who points out that phenomenologists generally attempt to understand what a specific experience is like by describing it as founded in actual situations and appearing to the people who are living it. Resulting from the latter, attention to experiences and intention to describe

experiences are the central qualities of phenomenological research. The researcher, in addition, often has a personal experience with the phenomenon and aims to heighten his/her own awareness of the experience while, simultaneously, examining and exploring it in-depth through the eyes of other participants. Simply put, phenomenologists hope to gain a better understanding of the meaning a specific experience has for others, as well as for themselves.

In line with the above, all the experiences of the participants eventually had to be reduced to a central meaning (Fouché, 2009b:270) in order to describe the essence of the HIV/aids-related experiences observed.

The phenomenological mode of inquiry was employed in this research because of its potential value to offer experiences that provide in-depth insight into the subjects of the research (SGB members) and the context (schools) in which they operate. The latter was necessary as it allowed the researcher to study the context in which the ecosystemic theories (*cf.* 3.2) could be effectively applied in order to suggest solutions for the problem at hand.

Case studies, on the other hand, enable the researcher to explore a single entity or phenomenon (governance strategy to combat HIV/aids) bounded by time and activity (a programme, event, process, institution or social group) and to collect detailed information by using a variety of data collection procedures during a sustained period of time (Burns & Grove, 1997:12; *cf.* 1.6.4). Almost any phenomenon can be examined by means of the case study method. Whereas some researchers focus on the study of one case because of its unique or exceptional qualities, this research aimed at studying multiple cases in order to allow the researcher to draw comparisons, build theory and propose generalizations. As such, eight different SGBs formed the case studies of this research.

5.2 3.1 The purpose of a case study

A case study is undertaken to shed light on a phenomenon (HIV/aids), to be a process (to govern schools to combat this pandemic), event, person (SGB members) or object of interest to the researcher. The term case study constitutes a single instance (the effect of HIV/aids on education) or limited number of units of analysis (specific individuals – SGB members and institutions – public schools) studied

intensively (Welman *et al.*, 2010:193). According to Franlin (1996:257), researchers generally undertake case studies for one of three purposes, namely to produce detailed descriptions of a phenomenon, develop possible explanations of it or evaluate the phenomenon.

The purpose of the case study, as part of this research, was to investigate the HIV/aids pandemic with specific emphasis on its effects on schools and, on the basis of the findings obtained through both a literature review and an empirical research, to suggest an ecosystemic school governance strategy for combating this pandemic. In line with this, the study also aimed at describing the roles of SGBs, staff members, learners, parents and community-members in this regard.

5.2.4 Research methods

Research methods refer, as put forward by Welman *et al.* (2010:36), to the means necessary to execute certain stages during the research process. These stages include define methods concerning data collection and data analysis, sampling and measurements.

5.2.4.1 Data collection strategy

As qualitative research is concerned with understanding a social phenomenon such as HIV/aids from the participants' perspectives, multi-method strategies were decided upon to obtain a wealth of rich descriptive and valid data from the participants (Mouton, 2009:169; *cf.* 1.6.4). These methods included document analysis, observations and interviews.

Qualitative interviews refer to two-way conversations in which the interviewer asks questions to collect data and to learn more about the ideas, beliefs, views, opinions and behaviours of the participants (Nieuwenhuis, 2007b:87). The main aim is to see the world through the eyes of the participants.

After gaining permission, initial pilot interviews were conducted with 5, randomly selected SGB members of different schools that those who formed part of the research sample. Data and feedback thus obtained enabled the researcher to evaluate the applicability of the interview questions posed and to review them. Semi-

structured interviews were, thereafter, decided upon as it defined the line of inquiry to some extent without posing too rigid an approach. Thereafter final, face-to-face interviews – a typical technique to collect data during a phenomenological study - directed at understanding the participants' perspectives on their every day lived experiences with the HIV/aids pandemic whilst governing schools (Welman *et al.*, 2010:192; McMillan & Schumacher, 2001:36) were held with the actual participants (*cf.* 1.6.5.2). This was done with the aim of presenting findings that would enable the researcher to suggest an ecosystemic governance strategy to combat the HIV/aids pandemic and eliminate its negative effects on education.

True to the nature of phenomenological research (Fouché, 2009b:270), the researcher entered the participants' schools (*life setting*) and placed himself in their *shoes* through extensive and prolonged engagement to develop patterns and relationships of meaning (Creswell, 2009:13). This was done analysing the conversations and interactions of individuals occurring from day-to-day in order to understand how individual SGB members make sense of their experiences and/or situation (McMillan & Schumacher, 2001:36). Conversely, data was systematically collected by way of individual face-to-face interviews, while the researcher aimed at putting his own experiences aside (Creswell, 2009:13). The empirical investigation was solely qualitative in nature and was conducted by means of interviews in order to gather information about the roles played by SGBs, staff members, learners, parents and the school community in combating the impact of the HIV/aids pandemic on learners and educators.

The above is in line with De Vos *et al.* (2009:540) indicating that case study researchers, after defining a specific focus for their studies, typically spend an extended period of time on site with research participants. A substantial amount of data is gathered from a wide variety of sources to present a description of the phenomenon or experience from the perspective of the participants. Case study researchers often assume an interactive role with their participants, becoming personally involved with the people and the phenomenon being studied. Observations are typically a part of the data collection effort as it enables the researcher to engage in informal conversations with the participants and to observe and understand the phenomenon as *they experience it*.

Since the ultimate aim of phenomenological studies is to provide textual descriptions of *what happened* and *how* the phenomenon was *experienced*, data was drawn from the researcher's written field notes made during observations (McMillan & Schumacher, 2009:490). These observations included a description of each participant's experience, including the researcher's, followed by a synthesized description of the essence of the observed experiences (Nieuwenhuis, 2007b:85; Annexure D).

The researcher visited the eight sampled township schools on several occasions, each visit with the purpose of negotiating the permission to interview SGB members, and afterwards explaining the purpose and conducting the interviews. During this period, observations were recorded structurally (Nieuwenhuis, 2007b:85) as only predetermined categories (HIV/aids, infected and/or affected role-players, SGB assistance, policy development, involvement and perceptions) were observed.

The researcher also explored current employed school governance strategies by using a variety of data collection procedures to collect detailed information over a sustained period of time (Creswell, 2009:13). By using a phenomenological case study as strategy of inquiry, the researcher was able to explore the processes followed and activities engaged in (Creswell, 2009:177) by the SGB members with regard to school governance. As part of this, the researcher obtained permission from the respective SGBs, to sit in at various SGB meetings conducted at the eight township schools that formed part of the sample. This strategy also led the researcher to a better understanding of the HIV/aids pandemic and the way SGBs endeavour to cope with it, as well as to make informed decisions (McMillan & Schumacher, 2001:419). The latter was possible as the researcher, moreover, reflected on his own thoughts and ideas about the meaning of what transpired (Nieuwenhuis, 2007b:85).

Observations done were enriched by analysing the HIV/aids policies compiled by the respective SGBs. This allowed the researcher to evaluate the significance of these bodies to, firstly, set guidelines for combating the HIV/aids pandemic and, secondly their ability to implement such policies. Such analysis, according to Mouton (2009:169), implies restructuring the intrinsic significance structures and the self-

understanding of individuals by residing close to the phenomenon under research and, thus obtaining an insider perspective (McMillan & Schumacher, 2001:452).

With regard to the interviews, semi-structured interview questions were developed in order to gather information on the impact of the HIV/aids pandemic on learners and educators and to establish what is currently being done to assist affected and/or infected role-players. Data thus obtained, together with the data gained through the literature review, was thereupon used to make suggestions on an ecosystemic school governance strategy for combating the impact of the HIV/aids pandemic on learners and educators.

When deciding on semi-structured interviews, a researcher normally compiles a list of themes (topics) and questions to be covered, although it may vary from one interview to another. Interview guides instead of strict interview schedules are thus followed. The flexibility and versatility of semi-structured interviews allow for questions to be posed to participants in different sequences, for additional questions to be asked, given the nature of events, as well as for the adaptation of questions and terminology to fit the background and educational level of the participants. It also allows for providing probes for clarification or elaboration if unclear or incomplete responses are obtained (Welman *et al.*; 2010:167). Since the topic HIV/aids is regarded as of a sensitive nature and the sample group came from divergent background, semi-structured interviews were the appropriate way of collecting the data in this study (Welman *et al.*, 2010:167).

An interview guide (see Annexure B) was drafted, prior to the interviews being conducted. The questions were prepared with the research problem in mind to test their consistency and to determine whether they were thorough enough and correct to elicit the required information. The questions were firstly pilot-studied to determine whether they were clearly and correctly understood by interviewees, to gain insight into cultural endowment of the informants, to obtain information on how to improve the final draft and to determine the approximate time to be allocated for interviews (Welman *et al.*, 2010:167-168). The pilot study was done with members of SGBs from township schools similar to those selected for the study within the Free State.

The questions, prepared in both English and Southern Sotho (the language most commonly spoken in the research area), consisted of four sections. Section A dealt with learners who are infected and/or affected by HIV/aids, section B addressed the issue of educators being infected and affected by HIV/aids, policy issues were assessed in section C, while section D endeavored to establish the perspectives of SGB members regarding this pandemic.

Interviews started with main questions to define the purpose of the investigation, namely to find effective ways to combat the HIV/aids pandemic. As such, questions regarding the current methods employed by SGB members were explored. These questions were followed by a few open-ended questions in order to elicit the participants' view and opinions on the effectiveness of such methods. In order to provide opportunities for the participants to react and/or challenge questions posed to them, testing questions (rephrasing answers previously obtained) were also included. The researcher planned for steering questions to be used if and when participants moved away from or tried to side-step the topic. The feelings, behaviour, attitude, opinion and reaction of participants were, moreover, tested through the use of indirect questions. In taking cognizance of the emotional impact of the HIV/aids pandemic on humans, factual questions were also scheduled for use if participants became too emotional (Welman *et al.*, 2010:202-203).

During the interviews it became apparent that some participants were reluctant to respond to questions, as they viewed them as a witch hunt which would reveal their weakness to govern schools effectively, while others were suspicious about the real aim of the interviews.

5.2.4.2 Data analysis

True to the qualitative nature of this research, the data obtained were analysed based on an interpretative philosophy, aiming at examining meaningful and representative content (Nieuwenhuis, 2007b:99). In line with this, emerging patterns and themes that emerged during the data collection phase were identified (*cf.* 6.2).

Data obtained during the observations and semi-structured interviews were recorded manually by making notes on interview and observation protocols. The raw field notes were processed by firstly converting them into write-ups in order for data thus

obtained to be read, edited for accuracy, commented on and analysed (Welman *et al.*, 2010:211). Thereupon the data was analysed manually. The text data was, accordingly, transcribed for further analysis in line with a phenomenological study which aims at analysing significant statements, generalizing meaningful units and developing essence descriptions (Creswell, 2009:184). The latter process also assisted in summarizing all data obtained (Mouton, 2009:67).

Accordingly, a hierarchical framework was developed to classify and organize the data according to key themes, categories and emergent sub-categories as described by Ritchie *et al.* (2003:219; *cf.* 6.2). A constant comparative content analysis to select, categorize, compare and interpret the collected data from the in-depth interviews was employed throughout.

Specific themes, identified before, after and during the data collection process (interviews) were intentionally reviewed by way of word analysis, relying mainly the emergence of key words. Emphasis was, however, not placed on the occurring and re-occurring of these key words only. The latter allowed the researcher, not only to understand the view of the participants better and to gain insight into their individual perspectives, but also to draw comparisons and identify contrasting responses obtained (Welman *et al.*, 2010:211-212). To elaborate on this method, connectors were also drawn between information to identify the logical development of the course of individual interview; as well as the development of the total data collection process.

The ultimate aim of analysing individual interview answers obtained was to identify similar patterns, which were thereupon transferred to index cards, obtaining information on specific themes (Welman *et al.*, 2010:213).

Thereupon, the data was coded by assigning labels and then aggregating similar codes into themes (Fouché, 2009:270; Ivankova *at al.*, 2007:257; Ary & Razavieh, 1990:479) and interpreted, using the research questions, interview questions, the ecosystemic perspective, prior knowledge gained through the literature review, as well as the responses received during the interviews. By coding the data in this manner, the researcher was enabled to attach interpretation codes (Welman *et al.*, 2010:214) related to the reasons, explanations and motives behind the factual data.

The phenomenological case study mode of inquiry also allowed the researcher to attain, as put forward by Creswell (2009:184), a detailed description of the setting and the individual SGB members, followed by analysis of the data for themes or issues.

The subthemes (*cf.* 6.2) were interconnected into a narrative and then developed into a theoretical strategy (Creswell, 2009:189); of school governance. To strengthen the findings, the HIV/aids policies of the respective schools were critically analysed in order to determine their authenticity and accuracy, to identify their meanings in the school setting and to evaluate their potential of effectively combating the HIV/aids pandemic (McMillan & Schumacher, 2001:453).

In order to transform the experiences of the participants into a description of their essence, findings were, accordingly, reported in such a way that would at once, present a reflective reliving and reflective appropriation of something meaningful (McMillan & Schumacher, 2009:36). To attain the latter, the different themes were analysed and shaped into a general description (Creswell, 2009:189) of the pandemic and its effects, as well as a school governance strategy to deal with this effectively. Themes and issues were analysed for each individual case and across different cases (Creswell, 2009:189). The researcher also went beyond the mere description of data by making complex theme connections (Creswell, 2009:189) and providing his own interpretations (lesson learned) about the cases (McMillan & Schumacher, 2001:37).

True to case studies which contain a description, analysis and naturalistic generalizations (McMillan & Schumacher, 2009:490), a report format with vignettes to provide various experiences, was compiled (Nojaj, 2003:381). In line herewith, the obtained data was scrutinized to detect issue-relevant meanings (McMillan & Schumacher, 2009:491). Data was, thereafter, presented visually by way of tables for clarification reasons.

After the data was analysed and interpreted, the findings were discussed in Chapter 8 in order to provide a clear, descriptive, explanatory framework of this study's findings by way of a narrative discussion, highlighted by applicable visual presentations as far as possible.

5.2.4.3 Sampling

Sampling, as outlined by Nieuwenhuis (2007b:79; *cf.* 1.6.5.2), refers to a process used to select a portion of the population for the study. The portion selected should be as trustfully representative (unbiased) as possible of the target population as it incorporates the concept of validity as an underlying epistemic criterion (Mouton, 2009:110). To ensure representativeness, the sample must have the exact properties in the exact same proportion as the population from which it was drawn (Welman *et al.*, 2010:55).

5.2.4.3.1 Description of the population

A clear definition of the target population is, as pointed out by Mouton (2009:110&132), needed as it allows for a representative sample to be systematically drawn in identifying the social context of the research problem (Creswell, 2009:176; *cf.* 1.6.5.1) and to develop a holistic account thereof.

A population to be researched refers, as outlined by Welman *et al.* (2010:52), to a collection of all units for analysis, and as such, according to Mouton (2009:134), includes the events or institutions and/or individuals having some common characteristics that the researcher is interested in. In conforming to the specifications of this research, namely to study school governance because of its intrinsic and immediate contextual significance in combating HIV/aids, all schools and their SGBs – responsible for school governance – falling under the jurisdiction and control of the Free State Department of Education were initially considered as the target population of this study.

However, to include all schools in this area was not financially viable and would cause unnecessary delays in the process of this study. Therefore, after careful consideration of these two factors, the researcher decided to limit his research population to the Northern part of Free State`s educational district. This district was, furthermore, more accessible to the researcher (*cf.* 1.6.5.1). Because of the great number of public schools in this area, the population was again limited by focusing only on township public schools in the Parys and Vredefort areas forming part of the Fezile Dabi Education District of the Free State.



Figure 5.1: The 5 education districts of the Free State province

The Fezile Dabi District Municipality, formerly known as Northern Free State District Municipality, is one of the 5 educational districts of the Free State Province of South Africa.

This district's economy is very concentrated, especially in the manufacturing sector, and thus very vulnerable to external economic fluctuations (Davis, 2006:15). As a direct result, Marais and Pelsler (2005) identify a couple of trends in the Free State's population change since 1991, namely out-migration from former homeland areas and an increasing migration from farms to small, urban areas. As such, most urban areas are left with a population consisting mostly of people within the 5-19 years old range, with 17.5% being without any formal education and 33.5% having received only primary education. HIV/aids rates, on the other hand, stand at 26.7%. This leaves most young children growing up in disadvantageous families (Magashule, 2009).

This makes the Free State province a noteworthy and suitable province for this study. It has, moreover, been suggested by Levine and Coupey (2003) that the urban human being in metropolitan areas may be at greater risk of engaging in risky behaviours than suburban or rural youth.

The population was divided into two homogeneous, non-overlapping groups or strata (h), namely public, township schools in the Parys area (h_1) and public, township

schools in the Vredefort area (h_2) forming part of the Fezile Dabi Education District of the Free State. This was done due to the Parys and Vredefort areas forming one natural subgroup of the 5 educational districts in the Fezile Dabi Education District. The Parys district has 8 primary public schools and 5 public secondary schools ($h_1=13$), while the Vredefort district is home to 3 public primary schools and 2 secondary schools ($h_2=5$; DoE:Free State). This brought the total population of the study to a total of 18 public township schools ($N=18$).

With the aim of selecting a stratified sample size of 8 schools, the sample size was allocated proportionally (cf. 1.6.5.2), thus selecting 6 (3 secondary and 3 primary schools) in the Parys area and 2 (1 secondary and 1 primary schools) in the Vredefort area).

To select a sample from the public township schools found in these areas, the researcher studied the various township public schools in order to select schools who have well established SGBs that are actively involved in their schools' governance. The latter allowed the researcher to decide on four primary township schools and four secondary township schools to form part of this study ($n=8$).

Township schools were selected against the background of the radical changes which occurred in South Africa over the last decade. Social structures changed with regard to, *inter alia*, rapid urbanization, a major collapse of family life and a new permissiveness leading towards increased levels of crime and the feared HIV/aids pandemic. Since many people left the Free State and moved to richer employment opportunities in Gauteng, the rural areas of the Free State were left isolated, vulnerable, powerless, impoverished and open to the collapse of values and norms, as well as the consequential moral looseness leading to it being prone to the HIV/aids pandemic which make them an ideal population to be premeditated for purposes of this study.

5.2.4.3.2 Probability sampling with a stratified method to draw the sample

Within the qualitative research design followed in this study, based on probability sampling, data was collected from people immersed in the setting of everyday life in which the study was framed (Ivankova *et al.*, 2007:257; cf. 1.6.5.2).

By employing a stratified sampling method, the researcher aimed at selecting particular participants on the basis of some defining characteristics that make them the holders of the data needed for the study (Mouton, 2009:110). In order to obtain the richest possible data (McMillan & Schumacher, 2001:176) to answer the research questions regarding HIV/aids and a governance strategy to combat it effectively, a smaller sample size (n=8; cf. 1.6.5.2) of public township schools was selected. This is in line with qualitative research designs involving smaller samples of people studied carefully by means of in-depth methods, rather than studying average tendencies of large groups (Welman *et al.*, 2010:9&34). It is, moreover, corresponding with the primary aim of this study, namely to produce an extensive description of the phenomena in its specific context (Mouton, 2009:133).

Since the study aimed at obtaining information only on the HIV/aids pandemic at schools (restricted settings) and how it can be governed effectively (restricted events and processes), stratified sampling enabled the researcher to restrict his sample further to SGB members only as they are the most informative on school governance (Nieuwenhuis, 2007b:79). Eight male and 4 female SGB members from the 8 schools selected, who indicated their willingness to participate, were accordingly identified. This is in line with Morse's view (quoted by Bernard & Ryan, 2010:360) that minimum of 6 interviews must be conducted with regard to phenomenological case studies.

The advantages of stratified purposive sampling include aspects such as cost effectiveness, being less time-consuming and assuring high participation rates. Such a sampling strategy may, however, be seriously flawed if data is not saturated. The researcher, accordingly, determined his sample on the basis of the existence of proper elected SGBs which are actively involved in school governance from the sample size identified (cf. 1.6.5.2).

Other disadvantages entail the fact that results depend on the unique characteristic of the sample and, due to being less representative of the sample, it is difficult to generalize the results to other subjects; as this research aimed at recommending a governance strategy to combat HIV/aids, which above its value to all facets of education, is of much more value to SGBs within a contextual framework (Mouton, 2009:133; McMillan & Schumacher, 2001:178). The findings of the research will,

nevertheless, also be useful to education as a whole since, as set forth by Donald *et al.* (2005:41), it is always crucial not to end up rejecting knowledge that has been developed in other social contexts when coming to terms with the influence of a social context.

5.3 QUALITY ASSURANCE

Although qualitative researchers do not agree about how to address the traditional topics of validity and reliability or rather credibility and trustworthiness or plausibility, they express some general consensus regarding how the credibility of findings might be ensured. A few of these suggestions are presented here.

Notions pertaining to validity imply, as set forth by Mouton (2009:30), the truthfulness of information presented by a researcher. The latter refers to the extent to which statements represent the true state of real affairs (Welman *et al.*, 2010:143). With specific reference to this study, it entails the extent to which an ecosystemic governance strategy contests with the social world of SGB members in an attempt to combat the HIV/aids pandemic at schools. To ensure credibility, the researcher endeavoured to investigate school governance in the most concrete terms of his and his participants` perceptions regarding this pandemic (Mouton, 2009:168).

Creswell (1994:17) discusses three types of interpretive validity that should be used to judge the validity of qualitative research:

- *Usefulness* refers to whether the research report enlightens those who read it or moves those who were studied to gain insight.
- *Contextual completeness* refers to the extent to which a comprehensive view of the situation is provided. Completeness can be achieved by including information about the history of the phenomenon, the physical setting, the activities, schedules and routines of the participants, as well as their individual perceptions and meanings.
- *Research positioning* refers to the researchers` awareness of their own influences (both subtle and direct) in the research setting. Such influences as beliefs, values and biases must be made explicit so that readers can determine the credibility of the findings for themselves. Finally, a researcher`s choice of

reporting style has a noticeable effect on a study's credibility. The researcher's reconstruction of participants' perceptions must be perceived to be authentic.

To enhance validity and trustworthiness in this study, triangulation was applied when interpreting the obtained data in order to reduce incorrect associations being made and to eliminate systematic biasness (Maree & Van der Westhuizen, 2007:39; *cf.* 1.7). The data obtained through the different data collection strategies employed were, accordingly, treated on an equal footing, evaluated, compared and balanced against the background of the theoretical perspective regarding ecosystemic governance strategies to provide new knowledge (Flick, 2011:186). As such the researcher was constantly looking out for data either substantiating or contradicting each other (McMillan & Schumacher, 2001:453).

In order to further obtain validity, pilot interviews were first conducted with members of SGBs from similar township schools in the Fezile Dabe District before the final interviews were done. The latter lead to enhancement of the credibility (internal validity) of the interviews as it tested the semi-structured questions posed and questions obtained beforehand (Maree & Van der Westhuizen, 2007:39).

As reliability pertains to the interpretation, accounts, inferences and/or conclusions drawn from the data collected (Maree & Van der Westhuizen, 2007:37-38), the researcher meticulously drew conclusions and made recommendations that are consistent with the obtained data. Trustworthiness, a concept that is preferred within qualitative research, refers to the way in which the inquirer is able to persuade the reader that the findings in the study are worth paying attention to and that the research is of a high quality (Maree, 2007: Appendixes).

Since scientists are rarely satisfied with establishing facts, they almost always want to explain why people behave as they do (Mouton: 2009:81). In order to present explanation of human behaviour surrounding the HIV/aids pandemic, the researcher, accordingly, aimed at providing a plausible account of this phenomenon through the eyes of his participants and to identify reasonable and certain pattern or regularities for combating this pandemic through an effective ecosystemic governance strategy.

Reliability or trustworthiness was accomplished through using multiple data collection strategies, namely document analysis of the existing HIV/aids policies,

observations and interviews. Crystallization (Nieuwenhuis, 2007b:81) was, in addition, applied to establish the validity/credibility and reliability of the research findings. As such, the HIV/aids pandemic together with its causes and effects was not regarded as being a set or rigid event, but was rather seen as a multifaceted event which changes over time. Data was analysed for any discrepancies. In line herewith the findings of this research does not represent a form of measuring, but rather the various data gathering techniques and data analyses used and, thus, a reinterpreted understanding of the phenomenon, either positive or negative.

It was already previously noted that the generalisability of the findings of this research will be limited to SGBs and will not be applicable to the wider educational content. Since the findings, however, concentrated on strategically govern schools effectively to combat HIV/aids, the researcher does not foresee this to be an important disadvantage. By distinguishing between contextual and generalizing research strategies, Mouton (2009:133) shows that contextual research, such as this study, aims at studying a phenomenon because of their intrinsic and immediate contextual significance. As a result, a research process aiming at investigating and proposing an ecosystemic governance strategy to combat the HIV/aids pandemic at schools, is not interested in providing representative examples of a larger population or universe, or in generalization *per se*.

5.4 CONCLUSION

Since the literature study, reported on in Chapter 2, showed that the HIV/aids pandemic is a complicated, socially erected phenomenon with manifold realities, an interpretative research paradigm was selected to be followed. To study the impact this pandemic has on the education sector, a disciplined inquiry was conducted. This was underscored by employing a phenomenological case study as the aim was to understand human behaviour in this regard by gaining insight into the perspectives held by SGBs directly involved in the governance of public schools and thus unswervingly experiencing the challenges presented by this pandemic.

In line with this, and by recognising the multiple natures of HIV/aids, a qualitative research design was selected as it allows for obtaining a holistic view on this phenomenon. The latter also assisted in studying the pandemic within an

ecosystemic framework. The importance of such a framework is outlined in the next chapter. The need to obtain a holistic view was, moreover, the reason for selecting three methods of collecting data, namely by way of document analysis, interviews and direct observations. Because of this, obtained data was analysed by employing an interpretative data analysis to allow for the emerging of different patterns and themes. To fully understand these patterns and themes, a hierarchical framework was developed and to interpret them correctly (ensuring trustworthiness and validity), all data was triangulated.

The population to be studied was selected to be township schools being part of the Fezile Dabi District of the Free State Province due to their potential of portraying the common characteristics the researcher was interested in. From the population, 8 schools were selected by way of a non-probability and purposive sampling process.

The next chapter defers the analysis and interpretation of the data collected by means of the research methodology discussed in this chapter in conjunction with Chapter 1.

CHAPTER 6

DATA ANALYSIS AND INTERPRETATION

6.1 INTRODUCTION

In deliberation with Chapter 5, outlining the empirical design followed in this study, Chapter 6 yields the analysis and interpretation of the data collected through the semi-structured interviews held with SGB members, observations made during the course of the fieldwork and analysis made of existing HIV/aids policies. By employing these three complementary data collection methods, the researcher gained both a breadth and depth of understanding regarding the current governance of public schools with regard to the HIV/aids pandemic. Such a holistic approach did not only allow for the implementation of an ecosystemic framework, but also for answering specific *how* and *why* questions regarding the governance of schools bowed down by the HIV/aids burden.

In line with the overall aim of this study, namely to set forth a governance strategy that can combat the HIV/AIDS pandemic effectively in schools, the current policies and methods used by SGBs were explored while questions were posed during interviews to ascertain the participants' view on their effectiveness.

It became apparent that HIV/aids poses various ecosystemic challenges to SGBs that influence their governing practices. By employing an interpretational analysis of the data obtained, the researcher was able to recognise multiple physical and contextual challenges that play an important role in the general governance of public schools. These challenges, as identified by the participants, are, *inter alia*, referred to in this chapter.

Eight public township schools (four primary and four secondary schools) were visited while twelve (eight males and four females) SGB members, forming an integral part of these schools, were interviewed.

After summarizing all data obtained and constantly comparing responses, a hierarchical framework was developed to classify and organize the data according to key themes, categories and emergent sub-categories.

Through conducting a form of triangulation (Figure 6.1) on data obtained, the specific themes and subthemes that emerged could be clearly portrayed in a manner that indicates the patterns that came to the fore. Because of the imperfections or inherent weaknesses of individual data collection methods, triangulation assisted in comparing the results obtained through the different data collection methods to calculate the full range of behaviours that improved the reliability of the research results by eliminating judgemental bias. It, moreover, allows for the gathered data to be combined, cross-checked and counterbalanced by the strengths of the other methods as the coherence and meaning of all data was considered to be more valuable than meanings attributed to different parts thereof (Mouton, 2009:169). As such, data validity is increased as the different sets of data (equally relied upon to obtain balanced results) are verified against one another. In line herewith, Denzin (quoted by Flick, 2011:186-187) highlight the importance of triangulation as a strategy of validation that can be used to combine different qualitative approaches.

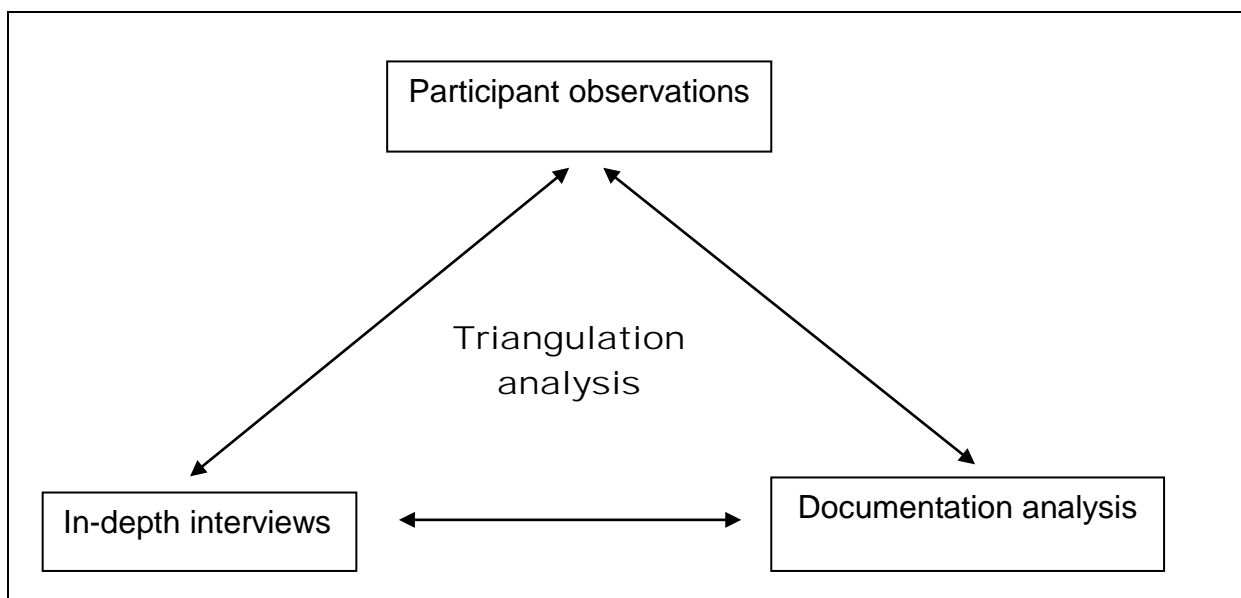


Figure 6.1: Triangulation data analysis

By triangulating the data, the researcher was, moreover, able to use visual representations such as tables and figures to interpret the qualitative data attained and to show how emerging themes, ideas and perceptions were related. Data is,

furthermore, intertwined by using a narrative approach into themes of significance, including direct quotes from participant responses and descriptions of what has been observed during field work. Numerical information is also provided to highlight the occurrence of multiple responses and to emphasise important textual evidence.

In providing the results flowing from the interpretation of the data, the researcher employed direct quotes from the interviews held with the participants, narratives to present information obtained during contextual observations, tables to demonstrate the interpretation made after analysing the policies of the relevant schools and mainly figures to depict the triangulation thereof.

Whilst interpreting the data, the researcher continuously linked it to the social ecological system's systemic of Bronfenbrenner as discussed in previous chapters in order not to award meaning to the data in a vacuum, but rather cohesively, within a set of related meanings.

6.2 THEMES, CATEGORIES AND EMERGING SUB-CATEGORIES

The following five subthemes (illustrated in Figure 6.2) emerged:

- Awareness regarding role-players affected and/or infected by HIV/aids,
- Current actions taken to assist learners and educators,
- The development of school policies with regard to HIV/aids,
- Involvement in combating the HIV/AIDS pandemic, and
- Perceptions held by SGB members with regard to this devastating disease.

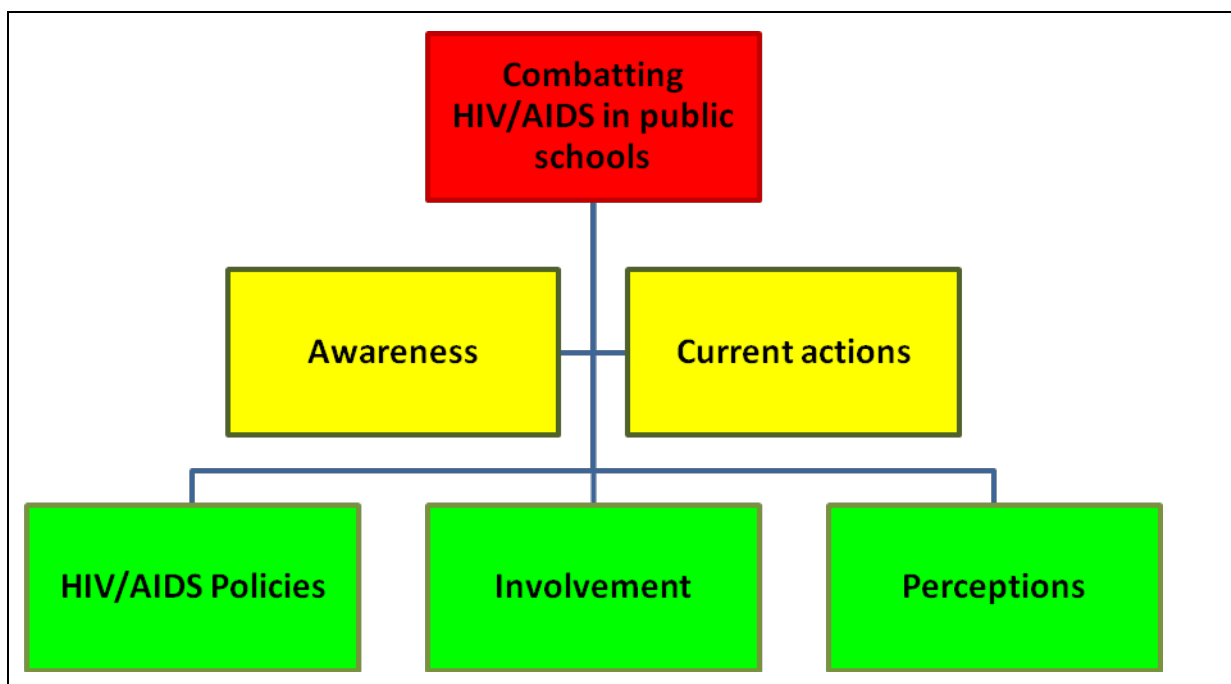


Figure 6.2: Central themes emerging from the data collected

The different themes were interconnected into a narrative as indicated in Table 6.1, while reference is also made to some general comments received from the participants. These themes are discussed individually with regard to the data obtained, firstly by way of the interviews, secondly through observations and, thirdly by analysing the five existing HIV/aids policies under each theme, while also triangulating the data to indicate the validity thereof.

Themes	Categories	Sub-categories
6.2.1 Awareness regarding role players affected and/or infected by HIV/aids	6.2.1.1 Learners infected and/or affected Educators infected and/or affected Learners orphanaged by HIV/aids	6.2.1.1.1 Secrecy surrounding HIV/aids Psychological guidance, care and additional support Safe school environments HIV/aids testing
6.2.2 Current actions taken to assist school governors	6.2.2.1 Learners infected and/or affected Educators infected and/or affected Learners orphanaged by HIV/aids	6.2.2.1.1 Awareness are needed to provide support Support for educators are lacking Alienation Socio-economic environment as ecosystemic predictor Local health clinics

6.2.3 The development of school policies with regard to HIV/aids	6.2.3.1 Existence of policies Effectiveness of polices Implementation of policies	6.2.3.1.1 Training on how to compile policies Involvement when compiling policies
6.2.4 Involvement in combating the HIV/AIDS pandemic	6.2.4.1 SGB meetings Involving educators, parents and learners Involving the broader community Support by departmental officials	6.2.4.1.1 Lack of cooperation and consultation
6.2.5 Perceptions held by SGB members with regard to this devastating disease	5.2.5.1 Cure of HIV/aids Awareness campaigns Schools' role in combating the HIV/aids pandemic	6.2.5.1.1 Medication and care Social grants Counseling Parent meetings No unfair discrimination

Table 6.1: Themes, categories and emerging sub-categories

How the above themes, categories and sub-categories, as revealed during the analysing process, came about are now individually discussed. The researcher also indicates, where applicable, his own interpretation of the data due to his own experiences and the observations made during his field work.

Each theme is firstly dealt with by referencing data collected by way of interviews, observations and data analysis followed by the categories and sub-categories that emerged. The analysis and interpretation of the data is then triangulated in order to obtain clarity thereupon before the next theme is addressed.

6.2.1 Awareness regarding role-players infected and/or affected by HIV/aids

With regard to the prevalence of HIV/aids as stated in literature, it became clear during the course of the study that this pandemic is not an isolated phenomenon known and experienced by only a few people. It is rather a devastating disease leaving millions either infected or adversely affected.

6.2.1.1 Category: Learners and educators infected and/or affected by HIV/AIDS and learners orphanaged by this pandemic

This category includes infected and/or affected learners and educators as well as learners orphanaged by the HIV/aids pandemic.

Interviews

According to the responses received to the question posed to the participants (SGB members) on whether they are aware of any (a) learners and/or (b) educators who are infected or directly affected by HIV/aids at their schools, the following emerged.

By far the majority (8) of the participants stated that they are indeed aware of the fact that there are such learners at their schools. Only a few (4) indicated that they are not aware of such learners. One participant responded as follows:

Our religious beliefs do not allow us to talk about someone else's illness openly. Children see it as a curse of God or going hand in hand with witchcraft, and do not talk about it, definitely not to adults. You know, we treat another's illness with high respect. There's a lot of secrecy around HIV/AIDS.

The high percentage obtained, indicates the presence of HIV/aids at schools among learners and underscores statistical figures referred to previously (cf. 1.1), showing the high numbers of people living in South Africa either infected and/or affected.

Surprisingly enough, a very small number of participants (2) indicated that they are aware of educators on their staff being infected and/or affected by HIV/aids. By far the greater part of participants (9), to the contrary, denoted that they are not aware of such educators at their schools. One participant, uncertain about how to react, for instance, responded:

Yes... no... I don't know. Should I know? It is none of my business...it's a private matter.

The majority response of SGB-members (9 plus 1) not being aware of educators,

who are infected or affected by HIV/aids, might be caused by the attitude of many parents still viewing educators as role models. As parents hold educators in high esteem, they might find it difficult to look at educators attentively. It is, however, as stressed by Frederickson *et al.* (2007; *cf.* 1.1), exactly educators' relatively higher socio-economic status that make them prey to this pandemic.

With regard to learners being orphaned by this pandemic, the bulk of participants (8) indicated that they are aware of such learners at their respective schools.

Observations

While conducting his fieldwork, the researcher, subsequently only observed a moderate absenteeism among educators, which was confirmed by the schools' attendance registers. This might be due to educators not being infected or to them having access to medical aid schemes and thus to doctors to assist them when they fall ill. Educators were, however, observed as being stressed when expected to take care of absent colleague's learners, leading to overcrowded classrooms in which learners did not receive sufficient teaching or experienced effective learning.

Corresponding with the interview results, a high rate of absenteeism among learners was observed. Learners, falling behind with their work, as observed in the field, were also evident because of high absenteeism rates.

While attending an SGB meeting, the researcher also became aware that once the issue of HIV/aids is mentioned, the majority of members sat back, folded their arms and hanged their heads, thus indicating their non-responsiveness.

Document analysis

The five policies analysed revealed the following Information regarding the awareness of the HIV/aids pandemic as portrayed in Table 6.2.

Awareness	Policy A	Policy B	Policy C	Policy D	Policy E
Mention made to educators/learners in the specific school	No reference Act supportively towards those with HIV, if it is known to us.	No reference	No reference Know how to identify learners who need support	It is a National emergency. Teachers will eventually be teaching some	Exactly the same as D

				learners who have HIV. One or more teachers will be infected.	
Orphans	No reference	No reference	Understand the specific needs of orphans	No reference	No reference
HIV/aids	General definition	Defined with a brief reference to its consequences	Endeavours to ensure that awareness is effectively communicated to the school community	Defined and how it is acquired and how not. Ensure that the message of HIV/aids awareness is effectively communicated in the school community.	Exactly the same as D
Secrecy	Acknowledges the reduction of the stigma attached thereto	Strictly / maximum, confidentiality in agreement with parents. No force to disclose	No reference	Must speak openly about it, attacking ignorance, prejudice and wrong ideas No forced disclosure. Information should be kept in confidence. HIV is your problem	Exactly the same as D
Discrimination	Non-discriminatory attitudes are encouraged No name calling	Not any discrimination	No reference	Instil non-discriminatory attitudes	No unfair discrimination
Learners admittance	No denial No testing	Should be admitted. May not be suspended	No reference	No denial	No denial. Right to attend the school
Educator appointments	No denial	No reference	No reference	No denial	Exactly the same as D

Table 6.2: HIV/aids policies and awareness of HIV/aids

6.2.1.1.1 Sub-categories

The following sub-categories emerged from the first theme:

The secrecy surrounding HIV/aids

Responses received on awareness rates might, according to the researcher, be due to ignorance or to participants being afraid to confess the existence of such learners openly in light of their culture or due to the sensitivity and/or secrecy surrounding the HIV/aids pandemic. According to the culture of many African people, it is unacceptable to discuss other people`s illness openly.

The above research results correspond with the research findings of Van Wyk and Lemmer (2007:306; *cf.* 2.2) who found that parents prefer to keep their, as well as their children`s HIV/aids status, a secret.

Psychological guidance, care and additional support

Information obtained through the literature study and conveyed in previous chapters has emphasized the importance of SGBs being aware of orphaned learners (*cf.* 1.1) as they may be in need of psychological guidance, care and additional support (Maree, 2008:64; Louw, 2005:195). The care provided for these learners, according to the participants is discussed later in this chapter.

Safe school environments

The research results, revealing a high number (8) of orphaned learners, also underlines the importance of Xaba`s (2006:17, *cf.* 1.1) words, stressing that school governors are challenged to create safe havens for all learners, which, *inter alia*, implies the elimination of psychological injuries. The latter is necessary to build learners` self-esteem, which in turn is needed to respond with empowered behaviour to the challenges HIV/aids presents (Francis & Rimmensberger, 2008:604).

To give effect to the ideal of establishing safe schools environments, Policy C set the provision of an enabling, caring and supportive environment for all HIV positive learners and educators as a central goal thereof. Policy B, moreover, aims at providing school environments that are *hygienic*.

HIV/aids-testing

Pienaar (2010b:2) reports on the Minister of Health`s aim to test a third of South

Africa's population (over the age of 12) for HIV/aids during a campaign which will be the biggest in history of this pandemic worldwide. In doing so, the Minister believes that millions of lives will be saved and that the infectious rate will be minimized. In collaboration with this, the same author (2010a:1) also reports on HIV-testing being conducted at public schools. The latter is, however, subjected to a system being implemented to assist those learners who test positive with effective follow-up support and limited to schools that will be regarded as being ready for such testing.

Data obtained during the course of this study, to the contrary, but in line with legislation prohibiting any admittance testing of learners, revealed that schools are not ready to embark on such an event.

Triangulation

It became evident that awareness regarding the extent of HIV/aids in schools is still largely inhibited by the secrecy surrounding it. The latter leads to the fact that people suffering from this pandemic, have very limited access to support within the different systems in which development and growth must occur. What is, however, interesting is that people want to hide the matter behind their cultural perspectives and behind the issue of utmost confidentiality. Policy 4 even states: *HIV/aids is not someone else's problem. It is my problem. It is your problem.*

This explains the non-responsive nature regarding its discussion by the participants (a hands-off approach) and, thus, the lack of providing appropriate support. The latter is, for instance, limited to providing food only, no psychological support is given. It, moreover, underscores the importance of employing a multidisciplinary ecosystemic governance strategy in schools which is able to make use of a person-in-context approach and to take notice of the intimate, interactive, social and biophysical dimensions in the immediate environment of the human being (*cf.* 3.2). Such a strategy allows SGBs to take cognisance of, for example, issues pertaining to, for instance, cultural diversity as situated in the micro-, exo- and macro-systems of learners.

HIV/aids is, moreover, viewed by the participant SGBs as a global issue, something that will, maybe, in future have to be addressed. From analysing the different policies

it became clear that SGBs currently feel that they have to ensure that they admit all learners and appoint educators without any form of discrimination. Although Policies 4 and 5 recognise that HIV/aids must be spoken about openly in order to combat the ignorance, prejudice and wrong ideas surrounding it, and Policy 3 providing for the ensurance that awareness regarding HIV/aids is effectively communicated to the school community, their behaviour during the interviews and observations mirrored exactly the opposite. Policy 3's reference regarding communication to the school community also emphasises the fact that it is not regarded as the school's priority to deal with the matter, merely communicating it is rather regarded as being sufficient.

As such, the conclusion can be drawn that the interrelatedness and interdependence between the various systems in which children develop, to ensure their optimal growth, is not taken into consideration by the respective SGBs. Triangulating the obtained data is portrayed in Figure 6.3 below while the influence of culture, dominant in the macro- exo- and micro systems are indicated.

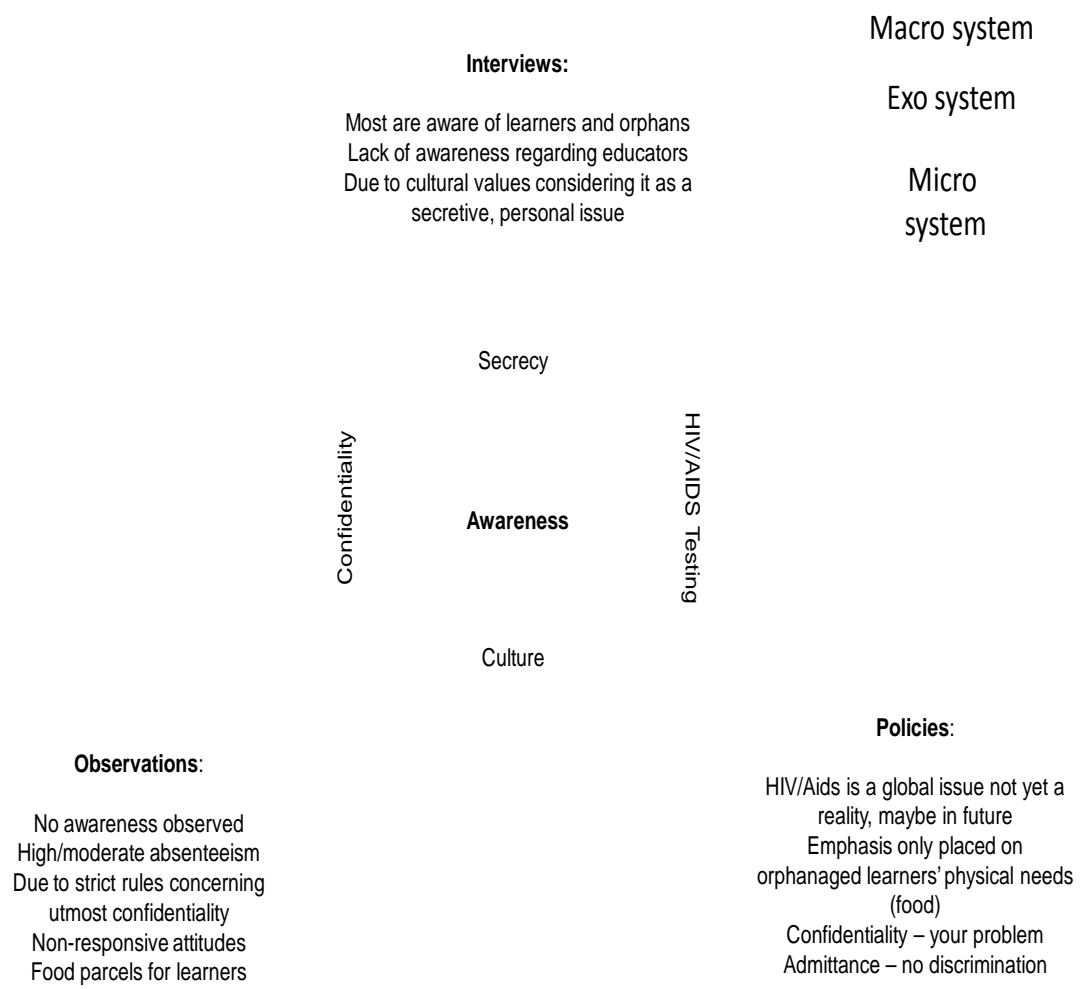


Figure 6.3: Triangulation – awareness of HIV/aids

If only taking account of the presence of people with and affected by HIV/aids in the respective schools according to the awareness thereof, statistics (cf. 1.1) regarding the high level of prevalence of this pandemic, especially among the younger generation, is confirmed by these research results. What is, however, troublesome, is the fact that although a high awareness exists concerning both learners with HIV/aids and those orphanaged by it, the confidentiality thereof is still overemphasized leading to those who are in a dire need of providing support, are rather opting for a relaxed and comfort position in this regard.

6.2.2 Current actions taken to assist educators and learners

Participants were asked to indicate whether their SGBs and schools are assisting educators and learners either infected or affected by the HIV/aids pandemic and orphaned learners, and if so, to provide practical examples of such assistance.

6.2.2.1 Category: Support provided for learners and educators infected and/or affected by HIV/AIDS as well as for learners orphaned by this pandemic

Interviews

From the responses obtained, it became apparent that the majority of learners infected and/or affected by HIV/aids (8), as well as orphanage learners (10), receive some physical assistance. It was, however to the contrary found that educators generally do not enjoy the same amount of support, if any. Since the results, thus, attained correlate with the results obtained with regard to awareness of the different groups, these results underscore the importance of being aware of the occurrence of this pandemic among, especially, educators. It, moreover, highlights the importance of taking a holistic approach (*cf.* 1.1 & 4.2) when endeavouring to combat the HIV/aids pandemic in schools since segmented projects aimed at supporting learners and educators which ignore micro-, meso- and macro-relationships cannot succeed as it will only provide fragmented pictures of reality.

Only one of the participants referred to education regarding HIV/aids as a potential instrument to alleviate the HIV/aids pandemic in schools. He pointed out that:

The school curriculum must include sex education in order to empower learners with knowledge about the danger and cures.

Observations

Whilst visiting the eight schools that form part of the study, the researcher observed high levels of frustration among educators as they are not being assisted and, especially, unable to handle learners with diverse needs effectively. Educators also viewed their concern regarding their own health when interacting with potential

HIV/aids infected learners which leads to nervousness, depression and them providing less attention to such learners or even ignoring them all together.

A shortage of funds at each school visited was also evident. SGB members often referred to the fact that they need more money in order to assist learners and educators sufficiently. Reference was, moreover, made to parents who are either not willing or not in the position to pay school fees and, thus, contributing to the effectiveness of the schools and their endeavours to assist all learners equally. Because of poverty within the local school communities, it also appeared to be a fruitless attempt to request from the surrounding community to donate money, clothes or even food to the schools.

Although attempts at establishing vegetable gardens, for instance, were visible at two of the schools, the researcher soon realized that it will not be sufficient, given the current situation, to satisfy the current poverty issues schools face, not even to mention, to uplift the immune system of those learners suffering from HIV/aids.

During visits to the respective schools, the researcher never saw any first aid kits or latex gloves being made available for use during emergencies. HIV/AIDS awareness campaigns or even slight, general or vague attempts at establishing hygienic environments, taking precautionary measures or any other attempt at minimizing the transmission of HIV/aids were absent at the schools observed. Seeing that the researcher did not observe teaching and training as part of his study, HIV/aids education was never observed. In line herewith, no comments can be made on the effectiveness or even on its existence.

Document analysis

Concerning support provided to educators and learners with respect to HIV/aids, the following were found while analyzing the available HIV/aids policies.

Support	Policy A	Policy B	Policy C	Policy D	Policy E
Education regarding HIV/aids	Basic information Life skills First Aid principles Drugs, sexual	Educators must include AIDS programmes in their year planning	Provide correct information	Educators must educate infected colleagues to accept, love and support	Educators must encourage infected colleagues to accept their

	abuse, violence and sexually transmitted diseases Non-discrimination Absences from sexual intercourse Accurate and scientific information understandable to all learners			them Correct information must be provided to learners and parents by way of awareness campaigns	condition and give love and support
Duties and responsibilities	Respect among learners	Everyone should show sympathy and act supportively, if known to them	No reference	Educators must take extra loads when others are absent Must set an example of responsible sexual behaviour	Educators must share extra work loads when others are absent
Safety measures	How to attend to open wounds Safety committee and principal must take steps to ensure staff and learner safety	All must be regarded as potentially HIV positive Safe handling of accidents and injuries – no direct contact with blood	Aim is to provide an enabling, caring and supportive environment for all HIV positive learners and educators	Exactly the same as Policy 3 No direct contact with blood	No reference
Support	Educators will be supplied with latex gloves	Only 2 educators are provided with first aid cases, containing gloves	Find out more about how learners can be affected, what ill learners need and how absenteeism can be managed	Must find ways to care for sick people School must keep First Aid Kit with gloves etc. Infected educators need understanding, rest and manageable workloads Support to	School should always have a First Aid Kit Same as policy 4 Same as

				<ul style="list-style-type: none"> a. learners by creating a safe and healthy school, peer support and care b. educators by promoting human rights, prohibiting discrimination and by providing moral support 	policy 4
Prevention/ precautionary measures	Rules relating to sport activities	To ensure that the school environment is kept hygienic General precautionary measures are applicable	Identifies 5 priorities: <ul style="list-style-type: none"> a. Prevention b. Care and support for learners c. Care and support for educators d. Protecting quality education e. Managing a coherent response Aims at minimising any transmission	<p>No reference</p> <p>Aims at minimising transmission</p>	No reference
Health care	Encourage learners to use health care, counselling and support service organisations	Department of Health should provide information	No reference	No reference	No reference
Educators	No sexual relationships with learners Must ensure that the dignity of all is respected	Should be informed by skilled people	Care and support should be provided to educators regarding: <ul style="list-style-type: none"> a. Their rights b. How they are affected by HIV/aids c. Thinking 	Must not have sexual relations with learners	Same as Policy 4

			<p>d. Understanding their responsibilities</p> <p>e. Understanding the needs of educators with HIV</p> <p>f. How the school can respond to their needs</p> <p>g. Finding of possible solutions</p> <p>develop skills to help staff members to act positively</p>		
Teaching and learning	No reference	No reference	Understand what threatens the provision of quality education	Illness disrupts it Ensure quality education by managing absenteeism, illness and trauma and by providing training to educators	Same as Policy 4

Table 6.3: HIV/aids policies and support structures

Although only one of the participants referred to education regarding HIV/aids as a potential instrument to alleviate the HIV/aids pandemic in schools, all five schools' HIV/aids policies takes notice thereof.

Provisions in this regard range from providing basic information to scientific knowledge that must be imparted to learners (Policy A). Policies B, C and D seem to place the obligation for education regarding HIV/aids solely on the shoulders of educators by providing that they must include such teaching as part of their year planning or by way of organising awareness campaigns. Educators are even burdened (Policies D and E) by the duty to educate and support colleagues in this regard and to take care of their duties when absent. Educators are, moreover,

cautioned to sustain from any sexual relationship with learners as they are supposed to role model appropriate sexual behaviour to learners.

In order to support educators in this regard, only two of the policies mentioned that educators should be informed by skilled people (Policy B) and should be provided by care and support (Policy C). No guidelines on how, where and when such support will be provided are, however, included.

With regard to safety measures, all of the policies refer to blood related treatment and the importance of the wearing of protective gloves. While Policy A mentions that all educators must be issued with latex gloves to keep with them, Policy B provided for such gloves to be issued to only two educators, whilst Policies D and E regard one first aid kit per school as sufficient.

Despite the fact that Policies C and D acknowledge the negative impact the HIV/AIDS pandemic may have on the provision of quality education, all policies are very vague when it comes to suggesting prevention strategies to combat this pandemic. Policy A merely refers to the need for rules concerning learner participation to sport activities, Policy B mentions that a hygienic environment must be aimed at, while Policy D indistinctly mentions the need to minimize any transmission of the virus.

Reference to health care is, furthermore, limited by Policy A to encouraging learners to make use of counselling and support organisations, while Policy B feels that it is the responsibility of the Department of Health to provide information in this regard. The issue of health care is regarded as so insignificant by the policies of the remaining three schools that it did not even need to be addressed.

6.2.2.1.1 Sub-categories

The following sub-categories concerning support provided emerged.

Awareness are needed to provide support

The results regarding support provided, underscore Van Wyk and Lemmer's (2007:306; *cf.* 2.2) concern that keeping one's HIV/AIDS status a secret, inhibits the realization of effective partnerships. It also underlines the importance of educators and health personnel being available and properly trained to assist learners and

educators to discuss their health and related problems openly.

What is of value about these findings is that they correspond exactly with the responses received to previous questions on awareness, as reflected below.

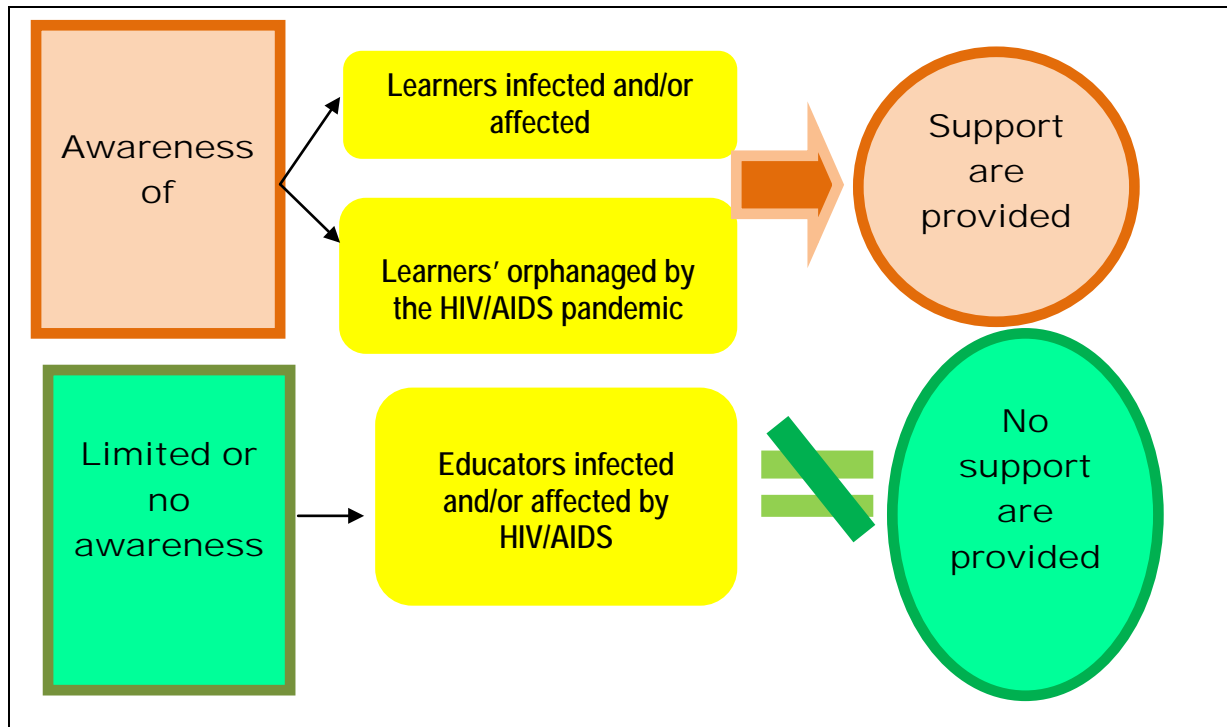


Figure 6.4: Awareness are needed for support to be provided

A conclusion that could be drawn is that the participants indicated that each person that they are aware of is indeed receiving help. Assistance is thus done on a case-by-case basis. If this is correct, the situation becomes even more problematic, as it entails that only those learners and educators which SGB members are aware of are receiving support. With the secrecy surrounding HIV/aids, this implies that a large number of learners and educators burdened by this pandemic are left unsupported.

Support for educators are lacking

Due to the lack of awareness among SGB members regarding the need of educators, it became evident that educators are by far the ones being neglected and even alienated (*cf.* 2.4) in this regard. Educators are, moreover, requested to carry the burden of educating and caring for learners on their own. In this regard, one of the participants pointed out that:

Teachers are the key to success if schools are to become an open channel for information on HIV/AIDS. HIV/aids teaches very sensitive issues and taboos, like sexuality, power relations and gender equity and thus requires a sensitive approach that only teachers can take.

A more comprehensive, holistic and long-term systemic view regarding the effects of HIV/aids on all members of the school society which can provide a synchronized, coherent picture is thus needed (cf. 3.2), for which a ecosystemic governance strategy allows.

The socio-economic environment as ecosystemic predictor

Most of the participants (10) indicated that their schools organize food parcels for infected and affected children. Other examples of assistance provided to such learners and educators include the establishment of vegetable gardens to feed them, while some also request local businesses to donate groceries and clothes.

In providing a reason for the establishment of vegetable gardens, one participant said:

All schools should be encouraged to start vegetable gardens. Learners who are infected and orphans will benefit from these gardens. Later learners should be encouraged to start vegetable gardens at homes. Fresh vegetables help to boost the immune system.

Learners are, in addition, presented with school uniforms and assisted in obtaining exemption from paying school fees, if applicable.



Figure 6.5: Support provided versus the socio-economic environment

The enormous emphasis placed on providing food and clothes to learners underscores the fact that the socio-economic environment in which children grows up is a significant exosystemic predictor of their overall well-being and future expectations (McWhirter *et al.*, 2004:29). This is also in line with the findings of Bachmann & Booyesen (2003:16), namely that changes within families cannot only be ascribed to the existence of HIV/aids in such families, as they are also brought along by population-wide changes, especially during express political and economic alterations.

Although some of the participants (2) also referred to HIV/aids awareness campaigns being organized at their schools, support are mainly provided to assist in the physical well-being of learners while their psychological well-being is negated. The latter is extremely cumbersome if taken into consideration that an pandemic such HIV/aids cannot be studied nor treated effectively without also taking cognisance of its effects on, *inter alia*, the mental health, education and well-being of those affected (*cf.* 3.2).

Local health clinics

While some participants indicated that learners and educators are encouraged to visit local clinics and to take their medication as prescribed, only one indicated that such learners are indeed taken to clinics, and then, only when they are not feeling well.

In this regard, one participant responded as follows:

Nurses from local clinics and NGOs like Khomanani are occasionally invited to counsel and educate learners about HIV/aids and to address the parents also present during parent evenings.

Another participant said:

Schools should adopt a nurse who will help with counseling, workshops about health related diseases and encourage those infected to take their medications accordingly. But the Department must see to it that there are feeding schemes for learners from poor families, infected learners and those suffering from HIV/aids related diseases.

Triangulation

The data attained through the three data collections methods confirmed the fact that educators are not receiving any support regarding HIV/aids, neither from their SGBs nor in terms of the policies of their schools. The latter only vaguely refer to information that should be provided to educators by skilled persons from outside of schools. The respective policies, to the contrary, are more specific when it comes to placing more responsibilities on educators not only towards educating, respecting and treating learners but also to care for and show understanding towards colleagues that may be infected.

It also became apparent that SGBs are only concerned about the physical well-being of learners. Emphasis is only placed on aspects such as food and clothing. With regard to the psychological well-being of learners, the participants clearly indicated that such issues are not their duty to attend to, but rather the responsibility of

educators (with no guidance from their side), health clinics and the Department of Education. The consequence hereof is that, learners are not approached as total human beings and that the network of relationships between different inherent elements, such as personality, identity and self-concept and external elements, such as the HIV/aids pandemic within the different social systems and within the various ecosystems surrounding the learner is not taken regards of (*cf.* 3.3.1.4).

Placing emphasis on poverty alone is also inefficient as research done by Bachmann and Booysen (2003:14) show that the average income and expenditure in HIV/aids affected households, burdened by morbidity, decrease more rapidly than in households unaffected by this pandemic. The importance of psychological assistance to learners is also outlined by Van der Merwe (2011:389) showing that the teaching of emotional intelligence has the potential to promote emotional skills, enhance positive attitudes and motivate learners. As such, learners are empowered by gaining an inner locus of control over external influences within the different systems such as the HIV/aids pandemic creating havoc in their lives.

The state of affairs in this regard, is reflected by Figure 6.6 that follows.

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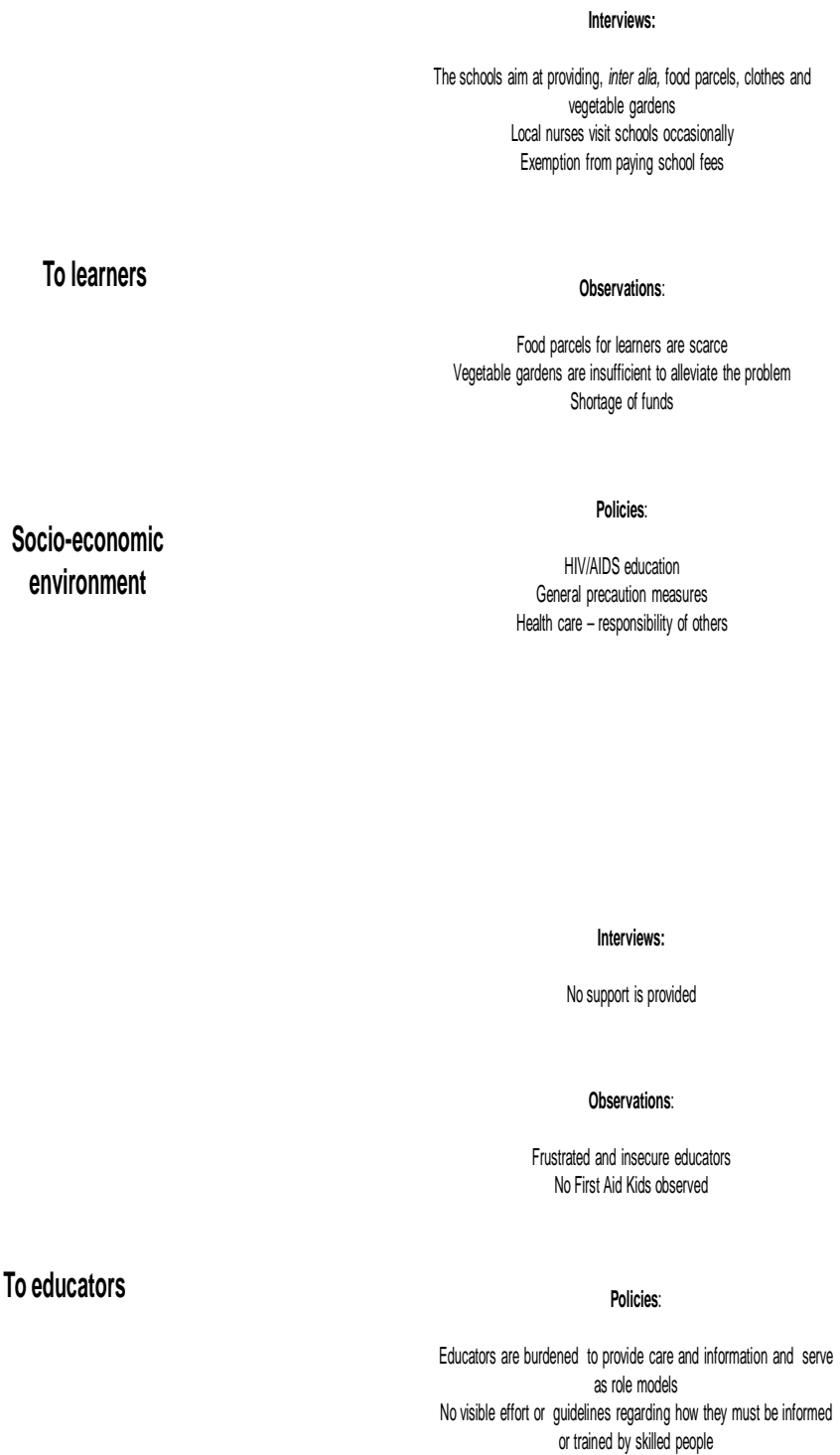


Figure 6.6: Triangulation of data regarding support provided to educators and learners with regard to HIV/aids

6.2.3 The development of school policies with regard to HIV/aids

In line with the concept of decentralization of power which entails the redistribution of power, stability, efficiency, quality, as well as financial advances, SGBs play a vital role in ensuring effective schools in South Africa by adhering to their immense statutory responsibilities (*cf.* 4.3). This entails that SGBs are obliged to solve the unique cultural differences in their schools on an individual basis with sensitivity, bringing about more organizational stability, and thus maintaining a dynamic balance at all public schools.

6.2.3.1 Category: Existence, effectiveness and implementation of policies

Since the mere existence of a policy on paper without being successfully implemented in practice is of no value, this category also addresses the composing, effectiveness and execution of such policies.

Interviews

While 7 of the participants indicated that their schools do indeed have an HIV/aids policy, only 5 of the 7 were in a position to provide a copy thereof. Those who indicated that they have policies in place, communicated that their policies were, *inter alia*, compiled by the Education Department of the Free State, by educators, School Based Support Teams, School Management Teams, previous SGBs, principals, Professional Working Groups, and/or HIV/aids Committees.

This is indicative of the fact that policies are often compiled by various other role-players although it is a particular function of SGBs in consultation with their school communities. A disadvantage in this regard is that it could lead to the non-implementation of such policies by SGBs, as well as to them never being evaluated and adopted. When school policies are, for instance, compiled by departmental officials, Professional Working Groups and HIV/aids Committees, it could imply that such policies are not tailor-made to fit the unique circumstances of each school.

The total absence of a relevant policy at 1 of the participant schools, and 2 schools not being able to provide a copy thereof on request, are also an indication of the

absence of the effective implementation of such policies, again leaving those affected and/or infection without any support.

Observations and document analysis

None of the participant SGB members ever referred to their school’s HIV/aids Policy during informal discussions. No evidence could also be found during visits or meetings of the implementation thereof. When requested for copies of their policies, the participants also appeared to be very nervous and made unfounded excuses for not being able to provide them. The researcher also had to wait and later return to schools on several occasions (up to six times) to collect the policies or even, in two cases end up empty handed. When analysing the five policies received the following administrative problems were found. None had a cover page, table of contents, definition list, and review or adoption dates. Only one of the policies was signed by the SGB Chairperson – the others had no signatures or indication of the person(s) who compiled or accepted them. Two of the policies (D and E) were also almost identical, indicative of the fact that they were not developed to meet individual school needs.

Further elements regarding the policies analysed are projected in Table 6.4, indicating the incompleteness thereof.

HIV/aids Policy	Policy A	Policy B	Policy C	Policy D	Policy E
The need for a Policy	No reference	No reference	Recognises the urgent need to develop a policy in response to the national HIV/aids	No reference	No reference
Vision	No reference	No reference	A school vision must be developed that is strong enough to stand up to the HIV/aids pandemic	No reference	No reference
Managing	No reference	No reference	Understand	No reference	No reference

			what it takes to make such a policy work		
Planning	No reference	No reference	Record a plan of action	No reference	No reference
Monitoring	No reference	No reference	No reference	No reference	Management must monitor the policy by involving the District office

Table 6.4: HIV/aids policies – further elements

6.2.3.1.1 Sub-categories

The following sub-categories emerged in this regard.

Training on how to compile policies for schools

According to the responses received on the question whether SGB members are receiving training or other developmental assistance on compiling school policies, and specifically an HIV/aids Policy, the majority of participants (9) indicated that they were never trained or developed to compile policies that will help their schools to combat HIV/aids. This creates a huge problem for SGB members who are expected to draft and adopt school policy (*cf.* 4.2) and to be capable decision-makers.

The fact that such a majority (9) of SGB members never received training in this regard implies that the majority of members are still in the dark about this important function and unable to participate effectively. It is, in addition, extremely difficult for the members who did receive training (only 3) to develop, implement and evaluate such policies alone.

The 3 participants who did receive training indicated that they were trained by officials from the Education Department of the Free State and by Non-Governmental Organisations such as Khomanani, Free State’s Department of Health, pastors and HIV/aids Awareness Groups, respectively. These participants, however, complained about the effectiveness of such training. One, for example stated:

Training received is insufficient we cannot understand what they say. They only use English, which we cannot thoroughly understand. I wish that they can help us in our mother tongue while providing more practical examples.

Involvement when compiling school policies

All of the participants indicated that they were not involved in compiling an HIV/aids policy for their school. Responses to their involvement include:

I found the policy here when I joined the School Governing Body...

These things must come from the department...

We cannot write such policies...

Triangulation

Data collected during the interviews, observations and data analysis process underscores each other concerning the following important facets:

- Although HIV/aids policies may exist, they are merely stacked away on shelves and are not effectual in itself or sufficient to be implemented successfully to combat the HIV/aids pandemic.
- Policies are drawn up by outsiders and, thus, futile in reflecting individual schools' unique needs.
- Policies are incomplete, not addressing relevant aspects such as a school's vision statement or important managerial, planning and monitoring matters, thus hampering their effective implementation in practice.
- Effective ongoing training on compiling policies for schools is imperative for SGBs to be actively involved and to fulfil their statutory functions.

In conclusion to the theme, the development of school policies with specific regard to HIV/aids in schools, the Figure 6.7 is added to show the interrelatedness and interdependence between the various categories and sub-categories as they emerged and discussed below.

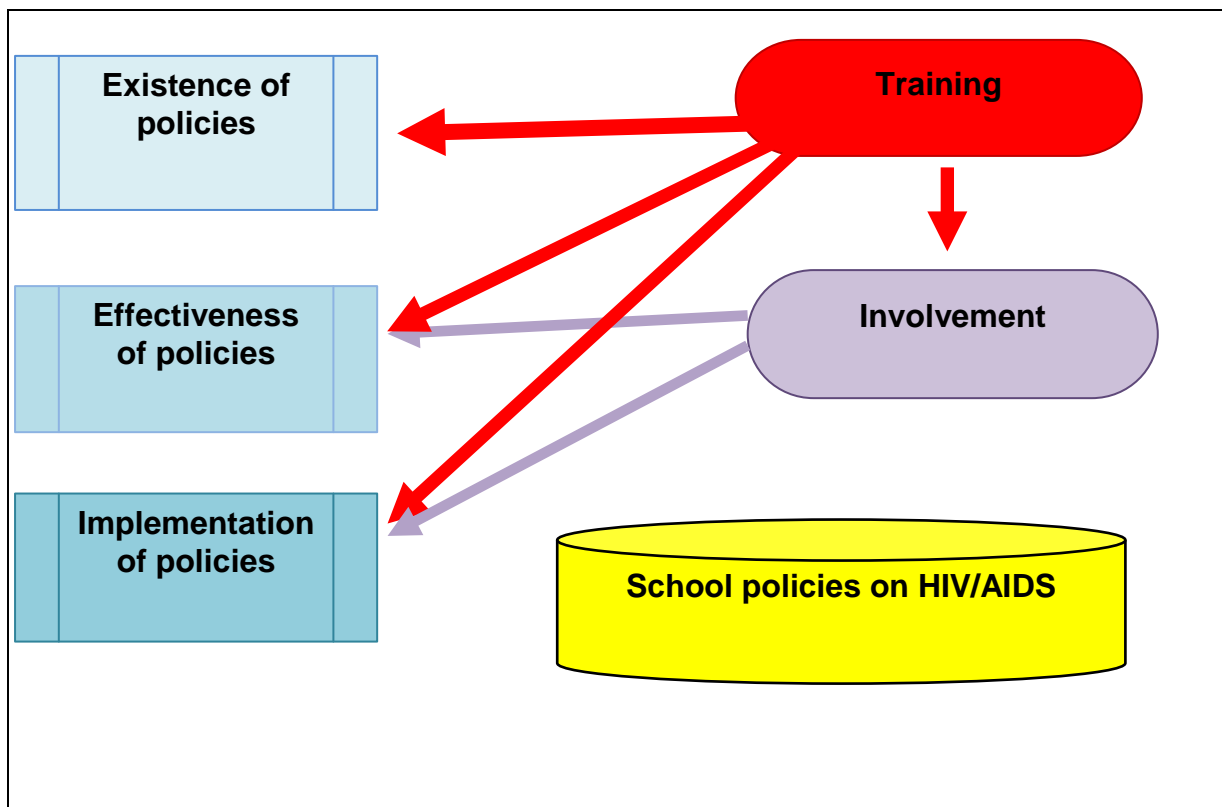


Figure 6.7: The interrelatedness and interdependence between various categories and sub-categories that emerged during the study

6.2.4 Involvement in combating the HIV/aids pandemic

In a follow-up question to obtain clarity on the issue of policies, the SGB members were asked about the involvement of learners, educators, parents, the broader community and district officials from the Department of Education.

6.2.4.1 Category: SGB meetings, the involvement of other role-players and support obtained from departmental officials

This category explores the extent to which educational role-players are involved in combating the HIV/AIDS pandemic.

Interviews

According to the responses received, only 3 of the SGB members do meet and discuss HIV/aids - related issues with educators, learners and other parents. Those who do, indicated that they meet four times a year, regularly, many times, seldom, sometimes in every quarter, during every SGB meeting, once on HIV/aids

Awareness Day, or during parents` meetings.

The majority (9), however, responded that they never meet with educators, learners or other parents. These results are extremely cumbersome as the battle against HIV/aids, specifically, cannot be won without consultation and cooperation with educators, learners and parents (taking a holistic, ecosystemic approach, drawing a parallel between ecological communities and learning communities and allowing for shifting the emphasis of the parts to the whole and, thus, to partnerships, *cf.* 4.3) as the most important role-players who are expected to lead schools towards quality education.

The picture regarding the involvement of the community at large (10) and Departemental Officials (9) on the other hand, appears to be much better. Community members who are said to be involved, according to the participants, are, *inter alia*, doctors, other infected people, Non Governmental Organisations, nurses from nearby clinics, HIV/aids Awareness Groups` Love Life members, and different community support groups and schools` adopted nurses.

Observations

Although the researcher requested to be informed by the 3 participants, who indicated that they do meet and discuss HIV/aids - related issues with educators, learners and other parents during the interviews about such a meeting, he was never informed. There was also no evidence that such meetings did indeed ever take place.

The researcher thereupon attended parents` evenings at 6 of the 8 schools under research who had parents` evenings. He discovered that these evenings were merely used to inform those parents who did attend on their children`s academic progression. HIV/aids were never mentioned nor discussed.

No evidence of nurses or doctors ever visiting the schools could be found in practice. The involvement of any Non Governmental Organisations was also not observed.

Document analysis

Whilst analysing the policies received, the aspects that came to the fore are depicted in Table 6.5.

Involvement	Policy A	Policy B	Policy C	Policy D	Policy E
Parents	Must attend SGB meetings providing information on HIV/aids	No reference	No reference	Correct information must be provided to parents by way of awareness campaigns	Same as policy 4
Community	No reference	Must be informed by way of poster demonstrations and talks	Work in partnership with others	All organs and society must be engaged All must live with dignity and contribute to society Invite NGOs to address people	School must work with NGO's to make educators and learners aware of HIV/aids
Health care	Encourage learners to use health care, counselling and support service organisations	Department of Health should provide information	No reference	No reference	Local nurses must be invited to provide statistics and information related to the AIDS pandemic
Department of Education				Everyone must take initiative and take the necessary precautions	District office must be involved

Table 6.5: HIV/aids policies and involvement

6.2.4.1.1 Sub-category: Lack of cooperation and consultation

Seeing that cooperative governance is synonymous with cooperation and consultation, these aspects need further pondering.

From the responses received, it became clear that more emphasis is placed on cooperation received from institutions outside of schools to combat the HIV/aids pandemic than in schools themselves. This corresponds with the finding, as stated above, that learners are merely encouraged to seek counselling and other forms of assistance from outside, such as local clinics.

Little emphasis is placed on consultation between the immediate role-players inside schools such as educators, learners and parents. This underscores the fact that SGBs may regard their roles as inferior or that combating such a pandemic is the sole responsibility of the State through the Department of Education who also have to train educators in this regard. The latter explains why the participant schools' policies reflected that it is mainly the duty of educators to; also, combat the HIV/aids pandemic at their schools.

One participant, however, highlighted the important role of parents in their children's lives by stating:

The degeneration of family unities and the disregarding of parents are leading children to become street children with low self-esteem. Parents should come to realise their responsibility towards their children and not leave the education task to educators alone.

Triangulation of the data received on involvement

After analysing the interviews, field notes and policies, it became evident that the SGBs regard issues pertaining to the HIV/aids pandemic as something to be dealt with externally. As such, the dynamic role that SGBs can play in leading schools to combat this pandemic is totally negated. The responses of the 3 participants who, indicated that they indeed involve and/or inform parents on this issue, could even not be substantiated by observations done in the field.

These findings emphasises the importance of an ecosystemic governance strategy that underscores the magnitude of compiling and implementing policies that are asset-based, internally focused and relationship driven while concentrating on establishing and strengthening inner resources and developing own capacities in order to address existing deficiencies effectively (*cf.* 4.3.1) and, thereby, allowing for addressing onslaughts such as the HIV/aids pandemic. Such a strategy will, in turn, allow SGBs to take ownership of their schools as well as the responsibility to address HIV/aids progressively.

Although the policies, *inter alia*, indicated that parents are obliged to attend meetings regarding HIV/aids (Policy A), that correct information must be provided to parents (Policies D & E), that parents must be made aware thereof by way of posters, demonstrations and talks (Policy B) and that partnerships with parents must be established (Policy C), the implementation thereof in practice was non-existent.

With regard to the involvement of people outside of schools, SGB members indicated that they receive assistance from various groups of people such as nurses, doctors and NGOs. The policies analysed reflected, among others, the importance of engaging all members of a society and invite NGOs to address people (Policies D & E), the need of the Department of Health to provide information (Policy B), and the necessity of local nurses to be invited to schools as well as the significance of involving district officials (Policy E). None of this could, however, be substantiated by observations done in the field.

The recognition and involvement of outsiders are equally important within an ecosystemic governance strategy as outsiders can create valuable social networks and increase the cooperative governance of schools (*cf.* 3.3.1.3). It is, however, always important to recognise schools' responsibilities to being self efficient networks within the broader framework of different social networks. The latter will, furthermore, assist SGBs to recognise that schools are but one subsystem nested in an ecosystemic whole (*cf.* 3.3.1.4).

By triangulating the data received on the issue of involvement, it became evident that a variety of information received through means of one data collection method is not substantiated by the other methods used as portrayed by Figure 6.8. The conclusion

that can, thus, be drawn is as follows: The ideal of cooperation and consultation set out the various policies are not implemented in practice and, therefore, only of theoretical value. This, *per se*, emphasises the need of school governors to adopt a systems way of thinking (*cf.* 3.3.1) by which a shift is incorporated from thinking in terms of hierarchies to support networks (*cf.* 3.3.1.4).

↳

I n v o l v e m e n t	Interviews	<p>Limited involvement of parents Lack of consultation and cooperation</p>
	Internal involvement	<p>Parents must attend meetings Correct information to parents through posters, demonstrations and talks Partnership with parents</p>
	Observations	<p>Doctors, nurses, other infected people, NGOs, HIV/AIDS Awareness Groups' Love Life members, and community support groups</p>
	External involvement	<p>Engage all society members Invite NGOs Department of Health Invite local nurses Involve district officials</p>
	Policies	

Figure 6.8: Triangulation of the data on involvement

6.2.5 Perceptions held by SGB members with regard to the HIV/aids pandemic

True to the qualitative nature of this study, the researcher also wanted to establish the perceptions of the participants regarding, *inter alia*, the possibility of finding a cure for the HIV/aids pandemic.

6.2.5.1 Category: A cure for HIV/aids, awareness campaigns and the role of schools' in combating this devastating pandemic

Data obtained in this category is forthwith outlined.

Interviews

By far the most (10) participants responded very positively to the question whether they believe that a cure for the devastating HIV/aids pandemic in South Africa will be found. Their hopes are placed on the efforts government is making through HIV/AIDS Awareness Days, distributing flyers and broadcasting advertisements on television and the radio, as well as on the efforts of the medical sector to research this phenomenon. These responses correlate with the lack of cooperation between the different role-players inside of schools (as stated previously) as SGB members regard the combating of this pandemic as a responsibility of the State alone.

One participant remarked:

Ignorance regarding HIV/aids must stop. HIV/aids is real and it kills - people should start talking about it openly.

Another participant opined that:

The secrecy surrounding it should be broken, those infected by it should not hide it, but rather speak to be helped and to help others.

Yet another offered that:

It must, however not be seen as a death sentence since it can be cured.

One participant also cautioned:

HIV/aids must not be associated with witchcraft. Those sexually active must realize that it is transmitted through sex, and use condoms. Teenagers must be taught to abstain from early sexual activities in order to prevent the virus from spreading.

Another indicated:

Although HIV/AIDS poses a real threat to the world, it can be beaten, as long as everyone is doing what is expected of them.

The research findings indicate that, although the majority (10) believe that HIV/aids can be cured, participants largely expect government to take measures to combat it, thus remaining ignorant of the essentially important role they can play individually or as part of SGBs and reluctant to take responsibility personally for this pandemic as a societal problem.

Observations

Observations made during school visits and through attending SGB meetings, support the overall perceptions obtained by way of the interviews. The SGB participants mirrored an ignorant attitude and behaviour towards the HIV/aids pandemic as if it is not a reality in schools as yet and as if it is merely a global issue that need the attention of the State and State departments alone. It became apparent that the participants do not see the urgency of the matter and, accordingly, not the necessity for them to address it seriously. Emphasis is rather placed on supporting learners who are poverty stricken without considering that HIV/aids may be one of the direct reasons therefore.

A total lack of effort with regards to this pandemic was observed. Participants were hesitant to discuss it formally or even to speak about it informally. The idea was created that it, firstly, is inappropriate to talk about it in public, secondly, that it is an unsuitable topic to discuss during meetings, thirdly, that they have more important issues to attend to and, lastly, that it is not their problem to deal with.

Although issues such as medication and care, the availability of social grants and counselling and parent meetings were alluded to, evidence in practice did

not imitate such concerns. What was, however, substantiated was the fact no record of any unfair discrimination on the basis of HIV/aids was observed. The latter could, though, be ascribed to a lack of awareness regarding its existence.

Document analysis

The five policies supported the data attained through the interviews and the observations done in the field. None of them made any reference to how the SGBs or the schools endeavour to provide a cure for the HIV/aids pandemic.

It was also, correspondingly, reflected that medical care and counselling were responsibilities identified to be taken care by either government or health clinics without providing any support in this regard. Non-discrimination was also vague referred to as indicated in Table 6.6.

Cure for HIV/aids	Policy A	Policy B	Policy C	Policy D	Policy E
Cure	No reference	No reference	No reference	No reference	No reference
Medical care and counselling	Encourage learners to use health care, counselling and support service organisations	Department of Health should provide information	No reference	No reference	Local nurses must be invited to provide statistics and information related to the AIDS pandemic
Parents meetings	Must attend SGB meetings providing information on HIV/aids	No reference	No reference	Correct information must be provided to parents by way of awareness campaigns	Same as policy 4
Non-discrimination	Non-discriminatory attitudes are encouraged No name calling	Not any discrimination	No reference	Instil non-discriminatory attitudes	No unfair discrimination

Table 6.6: HIV/aids Policies and a cure for HIV/aids

6.2.5.1.1 Sub-categories

The following sub-categories emerged.

Medication and care

A smaller majority (8) of participants responded positively to the question whether they regard their school as being capable of combatting the HIV/aids pandemic.

These participants were, thereupon, requested to indicate ways in which schools, and specifically SGB members, can assist infected and/or affected educators and learners. They responded that such educators and learners should be supported and provided with love and care. Efforts must also be made to ensure that they take their medication and that such medicine should be made available to them - again, unfortunately, shifting the onus to government. A participant opined as follows:

Government should provide infected ones with medication, make counselling available to all affected by it, sponsor researches to find a cure and stop politicizing the issue of a cure for this pandemic.

Social grants and counselling

Social grants for learners and counselling for both educators and learners were, moreover recommended. The special role of schools in this regarded was, unfortunately, concealed.

Parent meetings

From an SGB perspective, the participants indicated that, parent meetings must be organized during which parents can be educated about HIV/aids and taught how to accept, love, care and support others affected by this disease.

No unfair discrimination

Another important aspect which came to the fore was the fact that people must be made aware of the fact that no-one may be stigmatized and/or discriminated against for being HIV-positive and that they should not be regarded as cursed. One participant said:

Those infected by HIV/aids should never consider themselves as cursed.

Triangulation

Data attained regarding the perceptions held by the SGB participants reflected extremely important information on the way HIV/aids are perceived, approached and addressed in schools in contemporary South Africa. Although interesting and positive comments were received on the subject of curing the disease, no-one was prepared to commit themselves to playing a central role in the curing process. A shifting of responsibility was, rather found. It was, accordingly, clearly indicated that government must provide medication, social grants and counseling and that parents must be educated to accept others as they are and to provide adequate support, love and care.

The findings, in this regard, indicate the absence of another important element of systems-thinking, namely the ability to shift attention from structures to processes or textual thinking (*cf.* 3.3.1.5). The latter requires thinking in terms of connectedness. SGBs must, accordingly, be enabled to foresee the important role they can and must play by governing schools effectively and by facilitating and guiding processes rather than to wait on others to do it on their behalf, in order to, collaboratively, fight the HIV/AIDS pandemic successfully.

No unfair discrimination on the basis a person's HIV/aids status was addressed in the same manner by showing that *everyone* must be aware of the fact that no unfair discrimination may take place. Neither the interview responses nor the observations, at any stage, pointed towards the participants taking responsibility in a personal capacity or as a member of a SGB, for the HIV/aids pandemic. These results correspond with the findings of Schurink (2010:492&506) indicating that people often regard themselves as incapable of taking charge of their own lives. They rather wait for outside experts to fix their problems for them and regard the solving of such problems as the primary responsibility of the State.

It was also evident that stipulations which occurred in the various policies were merely provided lip service to and deemed to be important only on a theoretical basis.

In order to clearly depict the findings concerning the perspectives of SGB participants as to whom must combat the HIV/aids pandemic in South Africa, Figure 6.9 is included below.

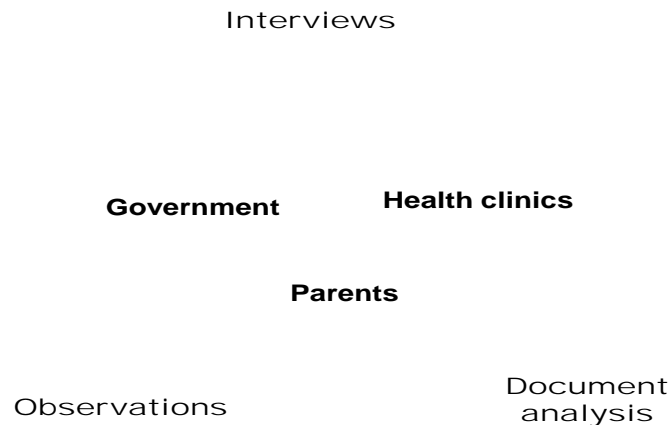


Figure 6.9: Responsibility for combating the HIV/aids pandemic in South Africa

6.3 CONCLUSION

By analysing the data received by way of interviews, field observations and document analysis, the researcher identified 5 themes from which various categories and sub-categories accrued. With regard to the awareness (Theme 1) of role-players being either infected or affected by HIV/aids and the support (Theme 2) being provided, it became evident that the secrecy surrounding this disease continues, not only to lead to people being unaware of each other’s pain and suffering, but also that such persons are not receiving support sufficient to assist them in carrying this burden.

It was found that the development of effective HIV/aids policies are far from being perfect as they are not compiled to suit the unique needs of schools and are not at all implement. Despite these shortcomings, the participants were found to be enthusiastic about this decease being cured.

Since the research results underscored the urgent need for guidance to SGBs in combating the HIV/aids pandemic, the next chapter provides a critical discussion on an ecosystemic governance strategy suitable, according to the researcher's view, to combat this pandemic at schools.

CHAPTER 7

THE RESEARCHER'S VIEW OF AN ECOSYSTEMIC GOVERNANCE STRATEGY

7.1 INTRODUCTION

As stressed by the World Health Organization (2003:7), the HIV/aids pandemic has crippled many African nations for years - stifling economic development, eroding the ranks of civil services and limiting the success of educational systems. At the centre of this global pandemic, both with regard to new infections as well as to opportunities for halting the transmission of HIV are the young on whom the future depends upon (Visser, 2007:678).

Since the behaviour, expectations and future orientation of the youth can best be formed and influenced at school, it is extremely important that schools become places in which learners can learn, dream and build their future (*cf.* 1.1). It is, accordingly, expected of schools to prepare learners for meaningful participation in South Africa's new democratic dispensation (Steyn *et al.*, 2007:1; *cf.* 4.7.1).

Chapter 1 has, however, shown that schools are indeed not safe havens for children. Focus was, accordingly placed on the importance of combating societal problems such as the HIV/aids pandemic, hampering school governors to create school environments conducive to teaching and learning, as well as to the overall healthy development of the youth. Since South Africa is characterized by a high prevalence of HIV/aids (*cf.* 1.1) leading to significant health problems, Mubangizi (2005:134) points to the essentiality of establishing effective prevention and treatment programmes. In underscoring this, Barry (2006:153) indicates that it is critical that this pandemic should be addressed at school level as it represents a challenge that confronts all South Africans equally. The latter led to the formulation of the problem statement for this research with the aim of suggesting an ecosystemic governance strategy at schools that can combat this pandemic effectively.

This chapter, therefore, consists of a discussion on such an ecosystemic governance strategy. As the formulation of school policies is one of the functions of SGBs (*cf.*

4.3), a literature review on developing and implementing an HIV/aids policy for effective school governance with specific emphasis placed on combating the impact of the HIV/aids pandemic on South African schools, is moreover provided.

7.2 BACKGROUND TO GOVERNANCE STRATEGIES

Unlike an operational strategy which is of shorter term, tactical, focused, implementable and assessable; a governance strategy is far-sighted, theoretical and directional (Abubaker & Amogne, 2002:397; Grobler, 2006:42). While an operational strategy includes operational issues such as tasks, deadlines, funding and the final planning for implementation, a governance strategy includes strategic issues relating to the *where, when, who, duration, budget* and the *how's*. As such, a governance approach rather concerns itself with setting forth who will perform exact duties and how goals will be achieved (Cordes *et al.*, 2004:582; Dudgeon *et al.*, 2004:81; *cf.* 4.3).

With specific reference to an effective governance strategy to combat the impact of an HIV/aids pandemic at schools, Howse (2003:85) and Smart (2000:13; *cf.* 2.2) propound that the primary goals must be to reduce the number of new HIV infections among educators and learners and to lessen the impact thereof on individuals, families and communities.

In developing an effective governance strategy, Pengpid *et al.* (2008:58) highlight that a successful and culturally suitable education and communications strategy is crucial. Increased access and adequacy to voluntary HIV counselling and testing is also needed. Improved care and treatment of HIV positive persons and persons living with AIDS, to promote a better quality of life and limit the need for hospital care, is additionally essential.

Hancock (2001:275) and Sutton (2001:75), similarly, offer that a governance strategy should be structured according to prevention, treatment, care and support, human rights, monitoring, research and surveillance (*cf.* 4.3).

7.3 SCHOOL GOVERNANCE WITHIN AN ECOSYSTEMIC FRAMEWORK

With reference to Bronfenbrenner's ecosystemic strategy (*cf.* 3.2), schools are important components of a child's total ecosystem. As such, schools are regarded by Joubert and Bray (2007:xii) as being microcosms of society. Since schools are creations of the social environment, Serfontein (2005:26) emphasises that schools do not only contribute to social change, but are also influenced by it. This entails that school governors must take cognizance of the fact that all educational role-players as living systems are nested within larger systems and that what transpires in one ecological system may influence events in other systems that are more proximate to the individual (McWhirter *et al.*, 2004:22; *cf.* 3.3.1.4).

As a result SGBs must take cognisance of the elements present in the educators and learners entire ecosystem that contributes to their overall behaviour as well as the mutual interaction between these elements when governing schools.

7.3.1 The interdependent and interrelated nature of ecosystems

With regard to the dynamic nature of HIV/aids, as outlined in Chapter 2, this pandemic negatively affects humans' entire ecosystem and thus the development of human resources and the growth of schools. This is in line with Bronfenbrenner emphasising the interrelatedness and interdependence among the various ecosystems (*cf.* 3.2). It is, therefore essential that the HIV/aids pandemic must be viewed by school governors as a vibrant situation confronting them with problems/challenges that are interdependent on one another – it is not an isolated incidence that can be dealt with in isolation.

To combat this pandemic, SGBs thus need to recognize the complexity of the contexts in which they find themselves while taking cognisance of the ever changing patterns in the different ecosystems that interact with each other (Berkhout, 2007:409; *cf.* 3.3.1). For this, a contextual analysis is essential as it enables SGBs to identify the interrelatedness of the different ecosystems - of which the schools is but one - and how all of them are influenced by HIV/aids. Schools must, thus, realize their connectedness with their communities that surround them.

Systems-thinking requires school governors to view schools as subsystems within the broader ecological model of open systems (*cf.* 3.3.1.6). As such, the influential cycles occurring between different systems must be taken into consideration when governing schools and educating learners.

Because of these influential cycles, the events transpiring in schools are dynamic and ever-changing. Schools are, for instance, continuously influenced by their external environments (technology, economy, policies and pandemics), as well as their internal environments (school cultures, funds and the people within). Because of the latter, schools have to coordinate, plan and control their activities skilfully.

It is in this regard that Engelbrecht (2001:22; *cf.* 3.3.1.2) states that education support officials are challenged to move away from a curative problem-orientated approach to a contextually relevant (ecosystemic), more subjectivist approach within the South African context to extend their professional activities.

The latter entails that schools should adopt strategies that could enable them to adapt to changes as well as to cope, control and constructively deal with negative external influences (inputs), such as HIV/aids, in order to sustain a dynamic balance at schools. To maintain such equilibrium, schools must create strategies (outputs) to counter negative inputs with the potential of disturbing their balance. Van der Merwe (2011:389) and Bodilly (1996a:45; *cf.* 3.1) points out that output indicators (what the school achieves) include achievements in academic standards and standards of behaviour.

In this regard, Collins (2003:213), as well as Becta (2003:34), put forward that learners' standards of attainment and their progress made at the end of each stage of their education, the quality of learners' responses, commitment and behaviour towards combating the HIV/aids pandemic, the state of order and discipline at the school, the efficient use of resources, and the provision made to ensure safe and secure school environments must, *inter alia*, be continuously evaluated to establish whether schools are indeed restoring and sustaining dynamic balances. Such evaluation should, according to Davis (1998:12), end with a published written report and contain recommendations designed to help the school continue to improve and develop.

7.3.2 The role of SGBs within an ecosystemic governance strategy

When it comes to combating the HIV/aids pandemic in schools by employing an ecosystemic governance strategy, the following essential roles of SGBs are outlined:

- As an integral part of humans' micro-systems, schools need to assist educators and learners to overcome the micro-systemic challenges presented by HIV/aids. This entails not only addressing problems that manifest themselves in classrooms and schools, but also in the family and school community.
- As schools, through their SGBs, are influenced by what transpires in their immediate school environments and are expected to govern schools in such a manner as to adapt to changes and make valuable contributions to solving societal problems, they carry the responsibility of collectively ensuring a quality of life for all its role-players.
- Seeing that the ultimate aim of schools is to provide quality education to all learners, SGBs must remember that quality is dependent on interactions – on what actually happens between people during the practical teaching and learning process (Donald *et al.*, 2002:20). In line with this it is essential that SGBs optimally interact with all education role-players and obtain their active involvement to combat the HIV/aids pandemic.
- Coupled with the aim of providing quality education and the function of SGBs being responsible for the overall ethos of schools (*cf.* 4.2), it is moreover important that SGBs create healthy and secure school environments meeting the needs of all learners and providing them with ample opportunities to better their lives (Pillay, 2010:87). Safe school environments, within the ambit of the HIV/aids pandemic, refer, according to Barry (2006:155&223-224) to schools that take reasonable measures to prevent HIV transmission such as, *inter alia*, providing appropriate training, awareness and education on the use of universal infection control measures to reduce the risk of HIV transmission, offering appropriate equipment, materials and protective clothing to protect learners, educators and other staff members from the risk of exposure to HIV, adopting measures to deal

with accidents and affording appropriate management of exposure to HIV and other blood-borne pathogens.

- It is equally important that educational leaders should be acutely aware of the HIV/aids pandemic, the effects of their own behaviour and the special role they have to play in reconstructing learners' social lives.
- Since the HIV/aids pandemic has a profound impact on South Africa's total social fibre, SGBs are obliged to put strategies in place to combat this pandemic in order to stimulate and sustain the improvement of the entire society (Mncube, 2009:64). As such, schools can contribute to bring forth better equipped citizens with the prospect of having quality lives and thus to a better South Africa for all.

7.4 A SUGGESTED ECOSYSTEMIC GOVERNANCE STRATEGY

In order to ensure clarity and to maintain continuity, a suggested ecosystemic governance model for combating the HIV/aids pandemic in schools, is forthwith discussed with reference to the main themes emerging from this study (*cf.* 6.2).

7.4.1 Awareness regarding role-players infected and/or affected by HIV/aids

To combat the HIV/aids pandemic, an ecosystemic governance strategy entails that SGBs systematically and thoroughly rethink the effects thereof within the context of a larger whole (*cf.* 3.3.1.2). They must, accordingly, become acutely aware of the presence of this pandemic in their midst as well as of the effects of their own behaviour and the special role they can play in this regard.

Since there is no general legal duty on educators or learners to disclose their HIV status (Barry, 2006:154&418) HIV/AIDS: Care and Support of Affected and Infected Learners Department of Health, 2003; *cf.* 2.2), knowledge of specific numbers is troublesome. To overcome related problems, Barry (2006:224) advocates that universal precautions must be consistently applied in which all people are regarded as potentially infected. As such, all school members must, for example, have easy access to latex gloves in order to protect themselves when assisting any other member having open wounds. Taking such an approach is also important for SGB members as rather treating all educators and learners as if they are infected and/or

affected by HIV/aids is better than ignoring the presence thereof all together or considering it as a problem that needs to be dealt with at an individual level.

In addition to this, Röhrs, (2007:ii) suggests that an atmosphere conducive to free dialogue between people and free discussions on HIV/aids-related issues be established. To create such an atmosphere in schools, SGBs need to ensure that (a) all role-players are respected and regarded as valuable, able and responsible human beings with the ability to think, choose and contribute to the overall well-being of the school and the entire community (b) learners and educators with HIV/aids, as well as their parents, families and friends do not suffer because of unfair discrimination and (c) that confidentiality (right to privacy) and informed consent of learners and educators with regard to HIV testing and test results be protected at all times (Steyn *et al.*, 2007:87).

Awareness of HIV/aids infected and/or affected school learners is, furthermore, of extreme importance as educators are currently, more than ever, being professionally and personally challenged to cope with changing school climates, as well as dramatic changes in the demographic make-up of the learner population which necessitates the need for a broader understanding of culture, as well as a need for new skills required to cope with learners who come to school with a host of special needs and social problems (Smit, 2007:53). Visser (2007:679), accordingly, points out that, educators need to have a clear understanding of the situation of young people, their needs and the issues influencing and maintaining high-risk behaviour. Such understanding is necessary for educators to, for example, implement intervention programmes to stem the tide of infections, such as HIV/aids among the future generation.

Awareness alone is, however, not sufficient, the provision of adequate support to learners and educators infected and/or affected by HIV/aids is equally important as it assists them to be resilient. The close link between awareness and support provided was outlined in Chapter 6.

7.4.2 Actions taken to assist learners and educators

It became evident from the data obtained by way of the multiple data collection strategies employed in this study that mere physical support is provided by SGBs to learners. The negative effects of HIV/aids on the mental well-being of educators and learners and thus their overall healthy development are subsequently largely negated. The latter entails providing encouragement, as well as emotional and spiritual support.

With regards to emotional support, Kamps and Engelbrecht (2011:39) propagate the importance of guiding learners to emotional intelligence as it, *inter alia*, enhances their understanding, appreciation and acceptance of the individuality of themselves and others. In this regard, Netshitahame and Van Vollenhoven (2002:315) refer to the duty of educators not only to teach and educate learners, but also to provide them with educational, physical and mental safety whilst also recognising that this cannot be achieved without proper management and planning.

Providing psychological support is, however, no easy task. Van der Westhuizen and Maree's (2009:44) research as well as that of Pillay and Wasielewski (2007:8-10) for example, shows that very little use is currently made of psychologists as they are in very short supply (4 to 5 specialists for 160 schools). Ellis and Shute (2007:652) underscore this by indicating that psychological support systems in the education department have all disappeared.

This leaves schools with the option of either attaining the assistance of the community in this regard or training educators on providing emotional support to learners and colleagues.

7.4.2.1 Community involvement

The first option highlights the need for SGBs to establish strong and positive bonds with pro-social institutions outside of schools, again emphasising the need to adopt an ecosystemic governance strategy noticing the interdependence between different ecosystems (*cf.* 3.2). By adopting such a strategy, school governors will come to realise that the promotion of a society's health is an integrated and inclusive activity

for which all should take responsibility. Actions can, accordingly, be taken to obtain the active involvement of the local community and private sector by establishing social support networks in order to generate more applicable intervention and prevention programmes, thus alleviating the pressure on the State, SGBs and educators.

By following a multi-disciplinary networking approach, social networks of support with the aim of benefitting all, can be established (Bender & Emslie, 2010:56; *cf.* 3.3.1.4). Such networks can, in turn, create the essential social capital needed by individuals to achieve their objectives in life (Frumence *et al.*, 2010:10-11). In this sense, social capital refers to a collective property resulting from different members' involvement and participation in various formal and informal settings. Social capital can, moreover, be bonded together in such a way that they extend beyond the boundaries of various social groups and cut across different communities and individuals in an attempt to solve society's problems. An example of the latter is the establishing of social networks that are strong enough to put social and cultural pressure on communities to such an extent that high sexual behaviour, for example, will be discouraged.

It is therefore essential that schools, through their SGBs, establish social support networks by which schools can benefit collectively and by which individuals may benefit by being able to access resources that are created through social cohesion and reciprocal relations (*cf.* 1.1 & 2.4). Social networks to combat HIV/aids should, *inter alia*, be created by schools in forming alliances with departments such as Social and Health Departments (Donald *et al.*, 2002:28). Lawrence (2008:37), moreover, points to the importance of obtaining the assistance of other departments and organizations such as social workers, churches and different non-governmental organizations and for them to become *partners in learning* through intensive networking.

In support, Engelbrecht (2001:22) alludes to the fact that professionals can play an immense role in building positive teaching and learning environments and a responsive curriculum to minimize barriers to learning and development, as well as promoting the general well-being of learners and educators alike. The latter is underscored by Frank *et al.* (2008:398) in showing that AIDS prevention

necessitates a collaborative effort from all sectors of society and the Department of Education in underlining the importance of vertical collaboration between educators and District Support Services.

To obtain the democratic participation by all role-players that can lead to social networks in contrast to SGBs dictating school events, Hall and Hord (2001:46), emphasize the need for community-members to be informed about their responsibilities and develop the ability to contribute to society. Kondlo (2010:385), moreover, stresses that, practices of grassroots public participation must be re-invented in order to ensure that it is accessible and known to all. In this regard, SGBs need to develop maintenance strategies within community system networks which can assist them to view learners, educators and parents (the primary and core role players in education) as part of various social systems (such as biological, community, society and global systems) in order to integrate tactical and strategic techniques across diverse educational management and governance practices.

7.4.2.2 HIV/aids education and psychological support

The second option entails HIV/aids education consisting of preventive intervention programmes to learners as it is recognised that the youth are the ones more open to influences and more likely to adopt new behavioural patterns (Visser, 2007:678). Within an ecosystemic framework such prevention programmes should be comprehensive, have multiple components and take a wider stance than merely providing support to learners. It should be directed at continuously instilling appropriate life skills to combat the HIV/aids in individuals, families, peers, schools, communities, the media and the workplace (Skiba, Monroe & Wodarski, 2004:350; World Health Organisation, 2003).

By referring to support provided to learners *per se*, Barry (2006:158) shows that HIV/AIDS education should be appropriate to the age of learners and form part of a holistic, integrated life skills curriculum, aiming at universal precautions to be taken.

Education regarding HIV/aids is important to eliminate the ignorance and fear surrounding this pandemic. To attain this, education should be accurate and comprehensive aiming at empowering all with the skills necessary to make critical, but informed decisions for themselves regarding their sexual activities and

implementing them in practice. Such education should also, according to Nieuwenhuis (2005:184) and Pilon (2003:3; *cf.* 3.3.1.6), be value-driven since valuing is an ongoing process of acquiring, redefining, adapting, reorganizing and prioritizing values through imparting meaning to a phenomenon such as HIV/aids. To implant values (shared aspects regarded by individuals as being *worth striving or living for* and as essential to collective welfare) into humans is imperative as persons' value systems urge them to act in a manner consistent with that which they regard as worth striving or living for, and consequently perceive as worth protecting, honouring and desiring when being confronted with reality.

With reference to the HIV/aids pandemic, the above implies that learners must be instilled with an appropriate value system that can guide their behaviour in a positive direction when they are confronted by this pandemic. It must, however, be realized that values cannot merely be given to learners - they must construct their own value system (it is first and foremost a very personal act) which will guide their future behaviour. Values are therefore a socially embedded process that regulates the social lives of humans. In this regard, Van den Aardweg and Van den Aardweg (1999:60) show that learners learn the meaning of values through their interaction with others and at schools with the role models educators represent to them.

Seeing that learners need commitment and ongoing support to develop optimally, HIV/aids education should be regarded as a lifelong process of acquiring information and forming healthy attitudes, beliefs and values (Pengpid *et al.*, 2008:49). Educators should also be role models of commitment to clear values in order to guide learners' future behaviour.

An ecosystemic governance strategy requires of SGBs to think in terms of systems and to, *inter alia*, move from analyzing problems to viewing problems in its context and, accordingly, taking cognizance of all contextual factors related to HIV-risk behaviour (*cf.* 3.3.1.2). It is in line with this necessary for school governors to ensure that HIV/aids education, counseling and health care provided are receptive to the culture (entailing the values, diverse understandings, norms, beliefs and traditions), language and social circumstances of their school community (Ayles *et al.*, 2009:6; *cf.* 3.2 & 4.3). All intervention programmes should, thus, be specifically developed to

match the culture, age and sexual experience of learners and should address the underlying reasons for high-risk behaviour.

With regard to educators providing psychological support, Leach (2002:110) emphasises the need for better training, guidance and counselling for educators as they need to take responsibility for listening to learners, teaching, tackling social problems and encouraging a constructive and collaborative relationship between them. The active involvement of learners' is important as learners need to be seen as a part of solutions and not just as having problems.

Discussions and open communication channels can forthwith assist both educators and learners in gaining knowledge, eliminating fear, gaining experience and forming caring relationships, making the disease more bearable for all. Educators, especially, need training and support in how to listen and provide for HIV-infected learners as such learners, according to Francis and Rimmensberger (2008:604), are more willing to talk to educators than to friends or family members.

Educators must remember that their role is not limited to the provision of intellectual support to the learners; they are also obliged to offer learners the opportunity to develop their verbal skills, which will enable them to express their emotions and resolve conflict by means of negotiation. To assist educators in this regard, SGBs could create school-based socio-emotional intervention programmes (instilling aspects such as acceptance, pride, motivation, self-confidence and optimism) used as a strategy against HIV/aids. In underscoring the importance of such programmes, Van der Merwe (2011:389) shows that education can change awareness, that knowledge and teaching methods can promote pro-social behaviour, and that it can empower learners. In view hereof, the same author highlights the fact that such programmes should incorporate the teaching learners' emotional intelligence. This is based on the belief that democratic school governance practices and emotional intelligence in classrooms can have an impact on learners assisting them to change their external loci of control (as a result of certain events in their lives) to inner loci of control. The implementation of socio-emotional intervention programmes by SGBs can therefore empower educators to guide learners to cognitive, emotional and social maturity and, consequently, to acquire socially acceptable philosophies in their lives.

7.4.3 The development of school policies with regard to HIV/aids

SGBs are tasked by the Constitution as well as the Schools Act with the function of compiling school policies while adhering to the principles of cooperative governance and partnerships (*cf.* 4.2). SGBs are, subsequently, obliged to create their own conceptions of school governance and participation which will guide, govern and justify their actions. As such, SGBs are active agents in the creation of their own governance practices.

Since SGBs are held accountable for their actions by society, they need to take the different needs of their school communities into consideration when compiling HIV/aids policies. This is important as Thornhill (2004:473) cautions that, when SGBs fail to heed the needs identified by their school community, they altogether fail their governing functions and act unaccountably. It is, therefore, essential that SGBs timeously identify and attend to their community's values and needs. The importance of the latter is underscored by Evers and Katyal (2007:379) by emphasising moral leadership and advocating that all leadership activities should be linked to the larger social good.

Concerning HIV/aids policies, Oosthuizen (2005:207) suggests that they be formulated in line with schools' mission statements, consisting of the fundamental and unique aspirations of schools as organizations to bring about positive structural changes. With reference to schools' mission statements, Le Roux *et al.* (2007:42) show that schools must adopt statements of intent relating to their overall objectives. Such statements should be stated in a manner as to transform schools to be alive, caring and functioning with enthusiasm despite numerous negative factors (Lawrence, 2008:34). SGBs should, accordingly, revisit their schools' mission every time when they compile policies for their schools (Naidu *et al.*, 2008:134).

It is, moreover, necessary that schools, *per se*, should be well structured in order to implement plans agreed upon effectively and achieve their objectives (Bisschoff, 2007:2). In this regard, Yap *et al.* (2000:45) outline that SGBs should spend time considering and identifying their aims and objectives, in collaboration with all role-players, since all school activities stem from their mission statements.

An ecosystemic governance strategy entails systems-thinking which requires of SGBs not to rely only on putting structures in place, but also to design processes that will lead to whole school development (*cf.* 3.3.1.5). When compiling HIV/aids policies, SGBs should, accordingly, identify processes to ensure the health and safety (physical and psychological) of educators and learners as well as processes appropriate to prevent and combat HIV/aids. SGBs are allowed to develop and adopt their own implementation plans on HIV/aids in order to give operational effect to the National Policy on HIV/aids, as well as to any applicable provincial education policy.

In this regard, Barry (2006:153) refers to appropriate measures at school level in the form of policies and programmes to prevent any discrimination, victimization and stigmatization, thereby raising awareness of the human rights of persons living with HIV. Such plans/policies must include legal duties and state how objectives will be achieved, as well as the timeframe involved.

Despite the fact that SGBs do not have to put development plans in writing after discussing their broad thrust and accepting them (this task may be delegated to others), they must, nevertheless, be closely involved in its creation (Bisschoff, 2007:3; Hess & Frederick, 1998:21; Guskey & Sparks, 1996:36). Other major role-players in the wider community, such as religious and traditional leaders, representatives of the medical or health care, could also be included to make valuable inputs when compiling such plans. SGBs should, moreover, widely discuss the resulting draft plan to ensure that it reflects the aims and priorities agreed upon and does so within the constraints of the school budget (Davies & Ellison, 1999:90).

In acknowledging the valuable inputs other role-players can make in drawing up an HIV/aids policy that can result into more comprehensive and diverse prevention strategies, an ecosystemic governance strategy emphasises the inclusion of families, learners and educators alike. Including all role-players, moreover, ensures that no misconceptions occur and that all – those responsible for and those affected by prevention processes – are fully involved. The latter necessitates that a true democratic route be taken, entailing consultation and cooperation to reach consensus on essential matters in order to move forward and reach set objectives through effective implementation.

For the successful implementation and sustainability of HIV/aids policies, SGBs need to enact and reenact such policies at the level of their individual schools. To attain this, HIV/aids policies must include monitoring procedures such as time scales for reporting back to SGBs and evaluation cycles to establish the effectiveness thereof. SGBs must, therefore, continuously monitor, critically evaluate and judge the success (with regard to their implementability and suitability) of their combating/developing plans in order to update, extend or adjust it in light of experiences gained from it (Röhrs, 2007:ii; Smit, 2007:56; Barlow, 1996:26). Policy development is, consequently, an ongoing process.

To evaluate the achievement of goals, Bernstein (1998:78) and Morris (2001:1) propose that schools give attention to various aspects. The latter include the processes and measurements taken by them to ensure their smooth functioning, the way in which school management and leadership are directed at achieving their goals, the manner in which school governance is conducted, the willingness of governors and staff members to implement development plans and processes, the attainment of other role-players to embark on them, the availability and management of resources, the empowerment of educators, as well as the effectiveness of guidance and counselling.

7.4.3.1 HIV/aids policies must be tailor-made

In acknowledging the interrelatedness and interdependence between various ecosystems, SGBs; following an ecosystemic governance strategy; can recognize the need for their HIV/aids policies to reflect the characteristics of the communities they serve and represent the specific interests of their parents. They are, moreover, aware of the fact that each individual, school and community possesses particular assets and abilities that can be used to enhance learner support and skills development.

As a result, broader environmental factors and contextualized developmental needs, problems, objectives and resource constraints such as, *inter alia*, poverty, unemployment, illiteracy and dysfunctional homes can be addressed. SGBs must, consequently, apply accepted governance strategies unique to their schools' individual character (Cloete, 2004:623; Jason & Barnes, 1997:215). The latter is

essential as cooperative governance does not imply, as put forward by Bouwman (2010:27), a *one size fits all* approach.

It is, hence, apparent that the nature of work conducted by principals and SGBs will differ in an attempt to reflect the needs of different schools within an ecosystemic framework. While some schools may require a greater emphasis on basic management, ensuring the school's functionality with reference to obtaining timely school attendance by learners and educators, maintaining order and discipline and obtaining adequate resources to enable teaching and learning to occur, other schools may adopt more visionary approaches. Schools therefore occupy special places in every community and it is through their governing bodies that they establish links with their communities in order to reflect their communities' interests in education. In this regard, Prew (2007:455) refers to the nexus between schools, their community and local economy constituting dynamic relationships that necessitate schools becoming service centres for the whole community.

With regard to South Africa's pluralistic society, it is essential for SGBs to take cognizance of the plethora of communities and their often divergent values and needs. By doing so, Bechan and Visser (2005:68) show that schools can even use diversity as a positive influence. To acknowledge and incorporate a complex set of values, Van den Aardweg and Van den Aardweg (1999:60) recommend school governors to obtain a thorough knowledge of the backgrounds of their school members.

From what is said thus far, it became apparent that SGBs must tailor made their policies to fit their social context. Following national education policies, the policies of other schools or policies drawn up by outsiders alone, is of no value. This is even more true within an ecosystemic governance strategy, which regards HIV/aids as being a socio-cultural issue (Mokgoro, 1997:v).

7.4.4 Involvement in combating the HIV/aids pandemic

Statutory functions are allocated to SGBs by the Schools Act with the aim of providing parents with opportunities to develop a sense of ownership of schools and, thus, to collectively take responsibility for what are happening at schools (Frumence *et al.*, 2010:18; Mncube, 2009:850).

To combat complex social dilemmas such as HIV/aids at school level, various authors (Frumence *et al.*, 2010:10; Van Wyk *et al.*, 2007:343; Nonnemaker *et al.*, 2003:2051) place emphasis on the active involvement of all education role-players. An ecosystemic governance strategy underscores this by stressing the fact that organizations (such as schools) are connected to, and embedded in a web of relations (*cf.* 3.3.1) and within a social economy which forms the social environment of the various role-players in such an organization (Bender & Emslie, 2010:64; Prinsloo & Nesor, 2007:46; McLennan, 2000).

In order to attain the active involvement of all role-players in education, SGBs need to make provision for the following:

- Consultation and collaboration (joint planning, decision-making and problem-solving in governance directed towards a common goal) between parents, staff, learners and the wider community, allowing them to work together as a team, share ideas and prioritize plans and goals. The latter entails, among others, establishing a link (strong bond) between community members by bringing those with various demographic and socio-economic characteristics together. This is attained by the Schools Act, providing that SGB members must be representative of their school communities Frank *et al.* (2008:398; Bisschoff, 2007:1; Pillay & Wasielewski, 2007:6; Engelbrecht, 2001:23).

Another advantage of electing SGB members to represent their communities, is the fact that such members can be utilized to empower the powerless in such communities and to shape social networks setting forth strict rules, norms and values to guide the behaviour of all community members, which in turn will contribute to the eradication of irresponsible behaviour and thus to the prevalence of HIV/aids.

- Building healthy relationships characterized by collaboration and built on mutual respect and trust (Weeks, 2009:1; Bush, 2007:398).
- Transforming schools into safe and caring schools in collaboration with parents. This entails that SGBs need to concentrate on people-centred deliberations and enriched conversations at grassroots level which have the ability to deepen the principles of democracy (Kondlo, 2010:385; Prew, 2007:459).

- Obtaining consensus through consultation and thus supporting school members to develop the capacity to act effectively in their own right instead of telling them what to do (Donald *et al.*, 2005:28) on all major issues and developing a sense of co-ownership and co-responsibility regarding schools (Joubert, 2007:41-43; Donald *et al.*, 2005:28).
- Creating school climates conducive to active involvement and democratic participation (Bender & Emslie, 2010:63; Weeks, 2009:1; McWhirter *et al.*, 2004:80).
- Realising that collaboration does not imply that individual role-players will enter relationships holding the same expectations and goals, but rather that each will bring unique perspectives, ideas and personal belief systems that hold equal weight and value to the table (Donald *et al.*, 2002:25; Engelbrecht, 2001:23).
- Following an ecosystemic, constructive and holistic approach to education, governance and care, thus taking diversity into consideration and assisting in viewing sustainable human development as being influenced by a legion of factors, including environments, socio-economic conditions, as well as political, institutional and managerial dimensions (Cloete, 2004:621; Guskey, 2000:66).
- Underscoring mutual trust and respect which requires unconditional acceptance.
- Effective and personal two-way communication processes between educators (schools) and parents (homes) which will increase efficacy of education and related programmes. It, moreover, has the advantage of enabling educators to work closely with parents, understand their learners better, and generate unique rather than routine solutions to problems and reach shared understanding with parents and learners (Mncube, 2009:84; Oosthuizen, 2005:202).
- Empowering, educating and informing parents thoroughly on the roles that they can play in combating the HIV/aids pandemic. This must be done as to obtain wider parental and community involvement and thus democratic participation as the latter is often inhibited by societal factors such as, *inter alia*, unemployment, alcoholism, drug-abuse, HIV/aids and poverty (Bender & Emslie, 2010:55; Schurink, 2010:507; Beckmann, 2009:131; Thornhil, 2004:475; Adams & Waghid,

2003:19). Encouraging wider participation is, as set out by no longer an ideology based on the good intentions of a few ideologists, but has become an imperative condition for survival.

- Achieving common goals and providing a sense of pride in obtaining cooperative success. This could be achieved by developing a collaborative ethic among role-players in understanding the dynamic interaction between them, as well as the reciprocal dynamic process which occurs among systems. For the latter, qualities such as negotiation, listening and communication skills; respect, empathy and sensitivity for others; openness, unselfishness, loyalty; as well as flexibility of thought, adaptability, critical thinking and good team work are essential (Steyn *et al.*, 2007:18; Engelbrecht, 2001:24).

7.4.5 Perceptions held by School Governing Body members with regard to the HIV/aids pandemic

SGBs need to mirror positive attitudes with regards to school governance (a spirit of mutual support to the benefit of all) as it leads to positive responses from others and enhances positive relationships.

To effectively employ an ecosystemic governance strategy, SGBs must become ecologically literate, *i.e* understand the principles of ecology (the language of nature or the principles of community; *cf.* 3.3). As part of the latter, they should truly understand important concepts such as interdependence, diversity, partnerships, energy flow, flexibility and sustainability in order to apply them to governing schools effectively. Knowledge of these aspects is even more important when school leaders are confronted with a pandemic such as HIV/aids.

In their strive to take notice of the unique needs of their school community and, in turn, recognise diversity, members of SGBs must not allow mutual and apparently insurmountable differences to cripple the education system, but should rather make a concerted effort to address differences in a transparent, professional manner in order to reconcile differences and to ensure peaceful coexistence.

It is time that the current idea of the State and Department of Education being the only ones responsible for education be transformed by a more inclusive, system-

based, preventative, participatory and development approach in line with the principles of sustainable public governance. In this regard it is essential that SGBs ensure that community views and choices indeed make it to decision-making levels. This could lead to instilling human dignity, a desire for personal growth, healthy self-esteem, self-reliance and the opportunity to learn and be responsible, instead of fostering dependence among community members.

In view of this SGBs must compose school-based programmes to combat HIV/aids whilst also providing for sufficient follow-up or long-term solutions. In support, Murphy and Gallagher (2009:158) contend that such programmes and processes are, inevitably, long and slow processes, which require, among others, SGBs' long-term care and empathy.

7.5 THE DEVELOPMENT OF HIV/AIDS POLICIES FOR SCHOOLS: PRACTICAL CONSIDERATIONS

In order to adhere to their immense statutory responsibilities as set out in Chapter 4, it is evident that SGBs play a vital role in ensuring effective schools in South Africa. The latter is in line with the concept of decentralization of power which entails the redistribution of power, stability, efficiency, quality, as well as financial advances.

7.5.1 The policy development process

In order to ensure safety at schools, Smit (2007:53) refers to the importance of major strategic commitment which involves placing school safety at the top of the educational agenda. Schools must, accordingly, recognise that developing and implementing safe-school policies are critical and essential.

A policy development process involves a combination of steps. For such purposes, the following steps are identified: Firstly identify the specific needs, then establish a policy development committee before conducting some research and analysing the findings. Only after research has been done, will committees be ready to draft a proposal for the policy from which the final policy can be drawn. It is also necessary that the final policy be communicated to all role-players and accepted. Since no policy is of use without implementation, it should be properly implemented and

continuously evaluated for its efficiency. These different steps will forthwith be clarified.

7.5.1.1 Identify the needs

The process of policy development starts with recognizing the need for a written policy. By employing an ecosystemic school governance strategy, the principal together with the SMT, SGB members, parents, learners and educators should all be involved in this process.

To explain and define unique needs clearly, all role-players should address the reason(s) for establishing a policy, its objectives and how it should be achieved, as well as the implementation and evaluation of such a policy.

7.5.1.2 Establishing a policy-developing committee

Role-player consultation and involvement in policy development processes are extremely important since they constitute the cornerstone of any democratic, cooperative governance (*cf.* 3.3.1.3) and will, moreover, ensure that people adopt, implement, endorse and identify themselves therewith. Whenever schools, therefore, want to develop policies and/or change an existing policy to address particular needs, all role-players should be invited to submit proposals on possible actions that could be taken. It is recommended that a committee be established to develop and/or change existing policies because of the vastness of the task. To provide guidance and leadership to such committees, the principal and/or an SMT member should form part of such a committee. Experts in communities can also be co-opted onto the committee.

7.5.1.3 Research and analysis

It is important to do research on and to analyse the issues at hand. This will help to determine the needs of the school and the extent of the problem. It will also assist in determining whether a new policy is indeed necessary and what should be included in such a policy. When following an ecosystemic strategy, the learner and his/her immediate family (micro-system); the interrelatedness between the home and school (meso-system); as well as the school's social setting, the State, the law and

community factors (exo-system) must be taken into consideration as system properties arise from the interactions and relationships between their different parts (cf. 3.3.1).

Research will also help to establish the existence of provincial and/or national policies which might assist in solving the problem. The existence of such policies might render efforts to develop new policies. Existing national and provincial policies will also provide the legal parameters within which the school must develop its own policies.

Research on and an analysis of the issues regarding the HIV/aids pandemic, will, in light of the above, therefore necessitate education role-players taking specific cognizance of the National Policy on HIV/AIDS at Public Schools in terms of section 3(4) of the National Education Policy Act, 27 of 1996, which encourages SGBs to develop and adopt their own implementation plans on HIV/aids to give effect to the policy (Barry, 2006:157). Relevant policies at provincial levels must also be consulted as they provide guidance to SGBs.

With regard to HIV/AIDS among educators and other staff members, the Code of Good Practice on Key Aspects of HIV/AIDS and Employment in terms of section 54(1)(a) of the Employment of Equity Act, 55 of 1998 and section 203(1)(a) of the Labour Relations Act, 66 of 1995, must also be noticed as it provides guidelines on managing HIV/aids in the workplace. This Act also underscores the importance of establishing and implementing an HIV/aids policy and programme.

7.5.1.4 The policy proposal

Only after a thorough investigation on the problem and assessment of the needs, may a final policy development process start.

Agreement on the format of the policy, its content and definitions of concepts and terms should be reached before the committee could proceed. The policy is at this stage still a mere proposal. Care should be taken that the draft complies with all relevant laws and national or provincial policies and that it take the interests and rights of all role-players into consideration.

This stage is characterized by broad and general aims, procedures and statements. Nothing is final yet, but it should in broad terms address the needs of the school and have the consent of all committee members. In order to obtain the latter, constant communication between all role players and the policy developing committee is very important. Committee members should, on a constant base, inform everyone of the progress and invite them to submit proposals which could be included in the final policy.

7.5.1.5 The final policy

When the committee is satisfied with the contents, definitions and format of the proposed policy and after inputs from all role players have been received and considered, the committee may proceed to construct the final document. In order to ensure that all aspects are covered, the following guidelines, as proposed by the Department of Education (2006:177), can be followed:

- Cover Page: Include a cover page, consisting of the policy's name, the name, logo and contact details of the school, the date on which the policy was adopted and implemented.
- Introduction: The purpose and aim of the policy should be clearly stated and explained. It should include a short statement that reflects the school's position on the issue.
- Purpose: This part contains the reasons, as aligned with the problem identified, for the policy.
- Table of contents: A table of contents with corresponding page numbers should be included for easy referencing.
- Definitions: A list of agreed upon definitions should be included. This ensures that all people affected by the policy clearly understand what is meant by each term used in the policy. Consensus on these definitions should be reached prior to the development of the final document.
- The content: This part should address the problem issues that prompted the policy. It could be divided into different headings. It should be tailor-made to suit the specific needs of the school and its stakeholders.
- Procedures: The procedures, forming part of different headings, indicate what should be done under different circumstances. The procedures should be in line

with the directives of the policy. It is important that all procedures should be fair, just, democratic, non-discriminatory, not violating the constitutional rights of learners, parents and educators. Reference should also be made to all relevant documents that could assure the correct implementation of the policy.

- Reference: A list of relevant policies, Acts, regulations, documents and circulars from national as well as provincial departments of education could be included in the policy, as they may verify the content of the policy, ensure its constitutionality and reinforce its legal status. These documents should be kept at school and be available and easily accessible.
- Acknowledgements: It is important, in order to prevent plagiarism, to acknowledge all Acts, policies, circulars, newsletters, documents and resources that have been used during the development of the policy.

7.6 CONCLUSION

As creations of social environment, schools are obliged to contribute in solving societal problems such as HIV/aids. Since optimal learning can only transpire when learners are able to fully interact with others, taking cognisance of all aspects present in learners' entire ecosystems, an ecosystemic governance strategy for SGBs, who are responsible for the overall ethos of schools, is proposed.

This strategy requires an understanding of ecosystems and an ability to apply systems-thinking processes. As an integral part hereof, SGBs are compelled to develop HIV/aids policies that can be implemented productively to combat this pandemic.

Elaborating on the data presented in the previous chapters, the following chapter provides a summary of the research and the findings arrived at, as well as recommendations on how to ecosystemically govern schools in order to combat the HIV/aids pandemic at South African schools.

CHAPTER 8

SUMMATION, FINDINGS AND RECOMMENDATIONS

8.1 INTRODUCTION

This chapter comprises of a summary of the previous chapters, followed by specific findings that have become clear from the research in order to establish an ecosystemic governance strategy to combat the HIV/aids pandemic in South African schools effectively. Finally, recommendations are made, aimed at suggesting a strategic school governance strategy which can contribute ecosystemically to combating the HIV/aids pandemic.

8.2 SUMMATION

With the aim of providing an overall orientation to the study, Chapter 1 outlined the research problem. It was stated national and international research reveal that HIV and AIDS have become the most common diagnosis among learners and educators globally. Various statistical data were alluded to in order to substantiate the fact that HIV/aids are, and continue to present major challenges to schools.

Numerous authors were referred to, stating that the increase in frequency of HIV/aids among the youth is caused by, *inter alia*, learners` temptation to explore their sexual identities through experimenting not only with sex, but also with alcohol, tobacco and drugs, which leads to fornication and promiscuous sexual behaviour.

The fact that many schools report a high rate of absenteeism among educators - due to illness caused by HIV/aids, as these diseases adversely affect a person`s immune system - as a major and increasing problem which is extensively disrupting all school activities in South Africa was, additionally, emphasised. Coupled with the latter, reference was also made to the unfortunate situation where educators are expected to accommodate 40 or more learners with diverse interests and needs per class. Such circumstances, as stated, are firstly experienced by educators as a nightmare and, secondly, as a disaster as it turns schools into places where learners get lost.

To address HIV/aids as a devastating social problem affecting humans' total ecological system, the questions and corresponding aims of this study were presented. In order to answer the research questions and to achieve the goals, Chapter 1 briefly outlined the empirical research design employed within an interpretive paradigm. As the mode of inquiry identified, a phenomenological case study was also put forward. In line with the latter, the population and sample as well as the data collection, analysis and interpretation strategies were identified. Other important notions such as ethical issues, quality assurance, the study's feasibility and possible contributions to education at large were, moreover, addressed, while potential challenges and limitation were identified.

As such, this chapter documented the research by providing a theoretical framework, a rationale and justification for the study. The chapter ended with a fore shadowing of the potential chapters to follow.

Chapter 2, on the other hand, provided information obtained through an in-depth literature study on the impact HIV/aids has on education in general and on educators and learners specifically. In this regard, reference was made to the fact that South Africa has, in the past decade, experienced an exponential growth in the prevalence of HIV infections, that the scale of this most severe pandemic is enormous and that the effects of HIV/aids-related deaths are felt by families, communities and schools.

Focus was, moreover, placed on statistics showing that HIV/aids does not befall the population equally, as young people between the ages of 15 and 24 are disproportionately affected worldwide.

HIV/aids leading to a decrease in the supply of education, management and the quality of education were alluded to with specific reference to educator absenteeism. It was, however, recognised that the supply of education does not depend only on the availability of educators and teaching learning materials at schools, but also on the capability of education systems to manage the whole education sector. Following the latter, the impact of this pandemic on education managers, educators and learners with regard to school enrolment, school attendance and drop-out from schools were also highlighted. It was, among others stated that schools with enrolment figures below a certain minimum may be closed and that the mere

presence of school buildings without willing and solvent parents to send their children to school amounts to a failure on the part of the government to provide sound education.

In line with the above, it was shown that schools, themselves, may be affected by psychological effects due to having HIV/aids in their midst and that discrimination, ostracism and isolation will occur at schools as those infected or ill are treated differently than others. The fact that educators may face the suspension of social and health benefits and/or dismissal from the system and that learners, on the other hand, may face formal suspension by the system or be pressured to leave school if they have not already dropped out, was emphasized.

An ecosystemic strategy was analysed and contextualized to the South African social context in Chapter 3. By recognizing the complicated webs of interactions and relationships between and in various systems, the interrelatedness of the different systems was emphasised, while the importance of understanding ecosystems and systems-thinking was highlighted. To facilitate the latter, various characteristics of systems-thinking were scrutinized. The ecosystemic impact of HIV/aids on educators specifically, was discussed, while ecosystemic support as a resilience-promoting resource was outlined. The latter was, furthermore, used to underscore the relevance of employing ecosystemic theories when considering an effective governance strategy that can guide schools to combat the HIV/aids pandemic successfully at South African schools.

In Chapter 4 the different elements of governance in general were firstly outlined. This was followed by a discussion on school leadership, management and governance while emphasizing the different roles school managers and governors are obliged to play in realizing effective teaching and learning of a high quality for South African learners.

Against the backdrop of South Africa's new democratic dispensation, focus was placed on school governance entailing, specifically, active participation by all role-players. Flowing from the latter, the importance of wider parental (part of the micro-system) and community involvement (part of the exo-system) in the governance of schools (part of the meso-system) to guide them to become social context (*cf.* 1.1) in

which the youth can build their dreams and formulate their plans concerning their future, became apparent in this chapter.

Chapter 5 elaborated on Chapter 1 with regard to the qualitative empirical design and methods followed in this study. As such, it presented the research methodology with specific reference to the research paradigm, design, mode of inquiry, as well as the methods employed to collect and analyse the data. The trustworthiness and credibility of the findings were also discussed.

Chapter 6 yields the analysis and interpretation of the data collected through the unstructured interviews held with SGB members, observations made during the course of the fieldwork and analysis made of existing HIV/aids policies.

Since school governors are continuously challenged by external forces such as HIV/aids, providing serious obstacles in their way to provide quality education for their learners, Chapter 7 provided the critical view of the researcher on an ecosystemic governance strategy to combat the HIV/aids pandemic at South African schools.

8.3 FINDINGS

After carefully analyzing and interpreting the data obtained through an extensive study of relevant literature and the empirical study, the researcher presents the findings in accordance with the research objectives identified in Chapter 1 hereof.

8.3.1 Findings based on research objective 1: Determining the impact of the HIV/aids pandemic on education in South Africa

Regarding the prevalence of HIV/aids as stated in literature, it became clear during the course of this study (*cf.* Chapter 2) that this pandemic is not an isolated phenomenon known and experienced by only a few people. It is rather a devastating disease leaving millions either infected and/or negatively affected by its effects.

The unconstructive negative consequences the HIV/aids pandemic have on education were found to include, *inter alia*, the following:

- Deaths, leading to poor school attendance, orphaned learners, high dropout rates and a loss of qualified educators.
- Loss of productivity among educators to such an extent that it even incapacitating them, thus depriving the education system of well qualified and experienced educators.
- Increased poverty due to the death of caregivers, leaving schools without being able to in school fees and being burdened with offer financial aid in the sense of providing food, clothes and related resources to school members.
- Enlarged financial burdens on schools in substituting ill educators.
- Psychological problems such as excessive stress, nervousness, depression and low self-esteem increases in the presence of the HIV/aids pandemic, inevitably causing educator and learner inefficiency with regard to teaching and learning.
- The active participation by all education role-players is inhibited and healthy collegial relationships are damaged.
- Schools are challenged, due to this pandemic, to cope with learners and educators carrying a baggage of social, financial, physical and emotional problems which, *per se*, creates barriers to teaching and learning.
- As institutions that need to respond to the needs of their community, schools are, accordingly, obliged to provide knowledge and awareness regarding HIV/AIDS, to establish support networks, empower learners with coping and problem-solving skills, furnish role models and instil values and norms.
- Schools are moreover challenged to establish safe and secure school environments amidst the HIV/AIDS pandemic that are conducive to the well-being of all role-players.

Despite this, this study's results found SGB members either being totally ignorant or unaware about the presence of HIV/aids among, especially, the educators at schools (*cf.* 6.2.1). Cultural beliefs were indicated as the main reason behind the latter (*cf.* 6.2.1.1). The latter led to learners only being provided with limited physical support

(no psychological support) and educators with none at all (*cf.* 6.2.2).

8.3.2 Findings based on research objective 2: Describing what ecosystemic theories have to offer in order to suggest a school governance strategy

Bronfenbrenner's ecosystemic system model proved to be useful in studying the effects of HIV/AIDS on education as well as to how schools can be governed to combat it. It was found that ecosystemic theories can offer the following important qualities for governing schools especially when confronted by a social problem such as HIV/aids:

- It recognises the dynamic balance, interconnection, interface and responsiveness between the different dimensions of a person's world.
- It entails placing emphasis on the whole (obtaining a holistic view) rather the parts of a problem during decision-making processes and thus not merely to analyse the effects of HIV/AIDS but also to place it in context with the larger whole. As such, SGBs will be able to better understand the educators and learners they work with and also to deal effectively with problems that arise.
- It provides for the shifting of attention from objects to relationships, thus empowering school governors to effectively collaborate within a system of cooperative governance.
- An ecosystemic theory will, in addition, authorize school governors to avoid building hierarchies by placing their schools above smaller systems but rather to build strong networks of relationships by creating sustainable school communities. SGBs will, thus, be enabled to put processes in place to combat problems such as HIV/aids and thus obtain ecological balance within schools.
- It has the potential to serve as a framework for decision-making, thus permitting SGB members to compile HIV/aids policies that can assist and support learners and educators infected with and/or affected by this pandemic.
- It provide a basis for more meticulous planning in dealing with the probable areas of HIV/aids impact on learners, educators and the education system in

general by adopting HIV/aids vision and mission statements for their schools in order to inform, motivate and involve all education role-players in the struggle against this deadly pandemic.

- By always stimulating school governors to think strategically and act operationally, it assists them to continuously benchmark, perform and monitor their schools in dealing with this pandemic.
- Ecosystemic theories, moreover, stimulate organizational change which can become a building block for future plans on combating HIV/aids.

8.3.3 Findings based on research objective 3: Explaining what South African school governance comprise

The following findings were made concerning school governance:

- Governance implies a linear model to change, thus emphasising collaboration and participatory democracy.
- SGBs are obliged by the Constitution, underscoring the concept of cooperative governance, to work together with the State as equal partners.
- Democratic participation necessitates the active involvement of all role-players in governance actions, it accordingly essential that SGBs ensure that the voices and views of their school communities are heard.
- There is a definite difference between school management, a function of school principals and school governance, an SGB function.
- SGBs have autonomy to govern schools in the best interests of learners, to create the overall ethos of schools and to compile school policies.
- SGBs were created in terms of the concept underscoring the decentralisation of power in South Africa, thus underscoring the significance of wider parental and community involvement in the governance of schools.

8.3.4 Findings based on research objective 4: Ascertaining whether an ecosystemic school governance strategy can be recommended to combat the HIV/aids pandemic on learners and educators

The research results of this study indicated that an ecosystemic governance strategy can indeed be applied to effectively combat the HIV/aids pandemic in schools. The following became evident:

- A multidisciplinary ecosystemic governance strategy has the potential of allowing for a person-in-context approach, taking notice of the intimate, interactive, social and biophysical dimensions in the immediate environment of the human being (*cf.* 4.2). As cultural beliefs were indicated as the main aspect obscuring SGBs from being aware of learners and educators needing extra support, this strategy allows them to also take cognisance of cultural diversity as situated in the micro-, exo- and macro-systems of educators and learners.
- Since it was outright found that awareness and support are indissolubly coupled to each other, the implementation of a multifaceted governance strategy allowing for a holistic approach to be taken is eminent. The latter will lead to school governors be enabled to establish comprehensive instead of segmented programmes, to support school members while taking their micro, meso- and macro-relationships into consideration.
- The importance of the effect brought along by socio-economic factors was underscored by the research results (*cf.* 6.2.2.1.1) which can be addressed successfully by following an ecosystemic governance strategy. This is important as socio-economic factors have an immense influence of the overall well-being and future expectations of the youth.
- An ecosystemic governance strategy, moreover, places immense emphasis on the creation of self efficient networks for school governors within the broader framework of different social networks. This not only empowers SGBs of becoming more self-governing orientated and thus taking responsibility for combat the HIV/aids in their own schools, but also to create social support networks within an ecosystemic whole. The latter is essential since schools need assistance from outsiders if they want to stop this pandemic in its roots.
- The governance of schools needs to be a collaborative effort which entails democratic participation and consultation with all role-players. Ecosystemic

governance strategies permit the taking of a holistic, ecosystemic approach, drawing a parallel between ecological communities and learning communities and allowing for shifting the emphasis of the parts to the whole and, thus, to partnerships, *cf.* 4.3).

- The results obtained on the lack of the involvement of SGB members regarding the compiling of HIV/aids policies, highlight the need for a ecosystemic governance strategy that underscores the magnitude of compiling and implementing policies that are asset-based, internally focused and relationship driven while concentrating on establishing and strengthening inner resources and developing own capacities in order to address existing deficiencies effectively (*cf.* 4.3.1) and, thereby, allowing for addressing onslaughts such as the HIV/aids pandemic. Such a strategy will, in turn, allow SGBs to take ownership of their schools as well as the responsibility to address HIV/aids progressively.

8.4 RECOMMENDATIONS

The following recommendations are made towards establishing an effective ecosystemic school governance strategy to combat the HIV/aids pandemic at South African schools.

HIV/aids is a reality and a current social challenge that needs to be understood clearly and be taken cognizance of to allow for growing beyond the past to the future. Since the challenges presented by the HIV/aids pandemic encompass the full extent of social reconstruction, education can play an immense role.

Re awareness

As the main sphere in which the youth are taught and guided to eventually lead their own lives, for which each individual must take responsibility, schools play an integral part in society.

Seeing that human behaviour is influenced by multiple factors situated in the different ecosystems in which they develop, it can only be fully understood and changed for the better within an ecosystemic strategy. This allows all involved in the development of learners to take a holistic approach, thus taking cognizance of all the elements that guide and influence learner behaviour. Although the process of

achieving real change in behaviour may be a long, slow and even never-ending process, schools must never give up changing and trying.

Although numerous studies have highlighted the importance of HIV/aids education in schools in order to make learners aware of how it is transmitted and thus how infection can be avoided, this pandemic is still gaining momentum. This is due, according to the researcher, to the fact that human behaviour cannot be regarded as an isolated dimension loose standing of external influences. In order to change human behaviour, the study recommends that an ecosystemic strategy is followed for educational role-players to recognise and address the elements (such as poverty, HIV/aids and urbanisation) situated in learners' entire ecosystem influencing their behaviour. It is, accordingly, important to address HIV/aids, acknowledged as a social problem, by endeavouring not only to concentrate on changing human behaviour *per se*, but rather to, painstakingly, address issues (such as depression, stress, anxiety and cultural beliefs) dictating their behaviour. Wider social transformation is essential. This is important as change is required both at a personal level and at an ecological or community level.

In view of the research results of this study, namely that SGBs still mirror a very ignorant attitude, thus negating their personal vulnerability, it is strongly recommended that school governors wake up. It is, moreover, suggested that they take responsibility for this social problem in order to assist in turning the negative cycles around into more positive ones, which can be achieved by following an ecosystemic governance strategy, permitting them to collaboratively make decisions on how to counter negative influences.

Although moral standards, values and humanitarian ethics must be introduced at homes at a very early stage, it must also be instilled in learners at school level. The prevailing moral climate, the attitude towards sexual behaviour and the general trend of ignorance regarding this pandemic must be tackled head on. This is said as the researcher believes that education can change awareness regarding HIV/aids and that knowledge and teaching methods can promote pro-social behaviour, thus empower learners to change their behaviour.

With regard to awareness regarding the HIV/aids pandemic the following additional recommendations are made:

- The secretary surrounding HIV/aids must be uplifted as it hampers schools to, firstly, be aware of its presence and, secondly, of providing support for those infected and/or affected. It, moreover, prevents schools in their aim of providing quality education to all (*cf.* 6.2.2).
- Since SGBs cannot ensure safe and secure environments in the absence of them being aware of HIV/aids figures in their schools (*cf.* 6.2.1.1), they must treat all school members as being potentially infected.
- Support to those educators and learners exposed to the HIV/aids pandemic, is in a dire need of, not only physical but also psychological support (*cf.* 6.2.2), thus SGBs must obtain and provide psychological support.
- The socio-economic environment in which schools are situated plays an important role when compiling school policies, when decisions are made regarding the support school members need and the amount of assistance that may be provided by the surrounding community, therefore obliging SGBs to take regard of their unique circumstances.
- For school policies to be effectively implemented, the composing thereof cannot be left to outsiders alone, they must be drawn up by SGBs in collaboration with other education role-players as they need to reflect the unique needs of a school community.
- It is essential that more cooperation and collaboration between all education role-players are obtained to combat the negative effects of social problems such as HIV/aids.
- SGBs must take a hands-on approach (play an active role) when it comes to solving the HIV/aids problem at school level.

Re support

Despite widespread propaganda regarding individuals to know their HIV status and even random testing is done, this study showed it to be insufficient as it is necessary for those infected and affected by this pandemic to obtain support from others. Knowledge about one self may lead to seeking help from formal institutions providing medical and psychological help. Because of financial strains, the researcher is of the

opinion that it will not be adequate in the long run. It is, therefore, important that SGBs govern schools to become places that are both physical and psychological safe. This can be attained by eliminating any unfair discrimination, whilst providing an atmosphere in which school members are motivated to ask for assistance needed.

Mass media campaigns to address the HIV/aids pandemic are, moreover, too often ineffective in the heterogeneous context of South Africa with its huge cultural diversity, discrepancies between rich and poor, urban and rural, and levels of education. To counter this problem, school governors must bring about awareness by means of HIV/aids education and discussions during parents' meetings.

To stimulate more openness regarding HIV/aids which will directly lead to higher awareness rates and thus the provision of more appropriate support, schools need to create school environments conducive thereto. Seeing that creating the overall ethos of schools is the responsibility of SGBs, it is their task to establish school climates that, firstly, promote open discussions on this theme and, secondly, are inviting to all role-players to become actively involved. The latter implies that parents, educators and learners, especially, experience a feeling of engagement and connectedness to schools.

Emphasis must also be placed on the fact that it is imperative for SGBs to realise the needs of those infected and/or affected. They must realise that physical assistance only addresses but one side of spectrum of the problem. These people are, moreover, in a dire need for psychosocial and psychological support to effectively combat the negative effects of the HIV/aids pandemic. An ecosystemic governance strategy can fulfil also these needs as it underscores that a holistic view be taken with regard to solving such problems.

Although it is recognised that the availability of resources always places constraints in the way of an ideal situation, SGBs should not be de-motivated by the lack of resources as it should not make it impossible to apply a holistic resource-based approach. It is, accordingly, suggested that SGBs must be creative in their approaches to combat this pandemic by becoming less problem-focused and more solution-focused. This could be attained by using, for example, re-cycled resources

in a creative manner and make use of parental and community skills by identifying them first.

Re involvement

It is of paramount importance that all members of the educational community be encouraged to become involved in preventing HIV/aids. By outlining the basic values and principles of public governance, subsection 195(e) of the Constitution also places emphasis on public participation.

Seeing that conflict is a natural part of democracy, any conflict arising from endeavours to combat HIV/aids must, conversely, be identified and resolved cooperatively. It must, alongside be remembered that democracy is a multi-faceted and long-term process that is continuously in need of pedagogic guidance and protection. Democracy is not something that occurs on the off chance or by way of a fully-fledged structure. It is rather a principle of life which, in order to succeed, sets itself the goal of shaping the totality of things present.

In line with this, schools, and in particular SGB members, should be made aware of the active and positive roles they can play individually and as a team in combating the HIV/AIDS pandemic. As HIV/aids is first and foremost a socially constructed disease for which the whole society should take responsibility, SGBs cannot leave it for government or others to solve. Combating this pandemic entails all sectors of government, all community role-players as well informed educators and learners to work together with SGBs.

It is in this regard important that capacity building be emphasised to accelerate HIV/aids prevention and control measures taken. It is recommended that this can only be achieved from an ecosystemic perspective. As such, interventions at all levels of systems, from the individual learner, educator and SGB member, through the classroom, to whole-school development, to school-community collaboration and ultimately to the wider issues of social transformation are needed. Such interventions could be established by creating an atmosphere conducive to participation at all levels.

Re HIV/aids policies

It became evident during the course of this study that HIV/aids policies need to be tailor-made to fit the specific needs of a school community, and thus be applicable to their unique social context, to be effectively implemented. Using ready-made policies is just not sufficient as they gather dust on book shelves, are not adjusted from time to time and are definitely not implemented.

Since an ecosystemic governance strategy aims at targeting problems in a holistic manner, it allows for school governors to pay attention to the immediate factors that influence their school members. With the latter in mind, school policies can be compiled taking notice of those factors most eminent in their specific context and, accordingly, develop positive elements while eliminating negative elements.

With reference to the HIV/aids pandemic, an ecosystemic governance strategy will, for example, empower SGBs to instill a culture-appropriate value system in learners upon which they can base their decisions and, consequently, change their sexual behaviour in an attempt to combat the spreading thereof.

It will, moreover, make them more powerful with regard to implementing their HIV/aids policies as to fulfil the specific needs of their school members. Such policies and concomitant programmes can, in addition, be structured according the resources available within a specific school community, thus optimally employing any potential that may exist.

For this to transpire, it is however essential that SGB, as a matter of urgency, be trained by educational officials on how to compile school policies, relevant to their needs. They must be trained on developing policies which are realistic and permit them to think strategically and act operationally.

All training programmes and methods with the aim of conveying important information to society should, however, ensure effective communication. For the latter to be attained, all communication processes must take the appropriate level of the target audience into consideration. In light hereof, it is essential to recommend that training with regard to the effective governance of schools to combat the HIV/aids pandemic at South African schools be done in a manner that takes cognisance of diversity, with specific reference to language differences.

Since SGB members are re-elected every three years, ongoing training is essential. To lighten the burden, it is recommended that public schools co-opt members from their communities with the necessary expertise who can remain members for longer periods to bring along more stability and consistency regarding the governance of schools.

8.5 FUTURE RESEARCH

A number of related aspects could be addressed in future research on combating the HIV/aids pandemic in South Africa. Future studies could focus on the following:

- Evaluating management intervention strategies aimed at combating the impact of HIV/aids on learners and educators.
- A critical analysis of the ability of District-based Support Teams to alleviate the impact of HIV/aids on schools.
- Establishing an effective training programme, taking diversity into account, for SGB members and educators in dealing successfully with this pandemic.

8.6 CONCLUDING REMARKS

The researcher is concerned about the fact that seventeen years down the line of the newly found democracy, South Africa still appears to be at the HIV/aids crossroads that could lead to an educational disaster.

The time is right and the time is now for school governors to take up the challenges presented to them by the HIV/aids pandemic. They must acknowledge the presence of this pandemic amongst their school members and treat all as if potentially infected. It is a reality confronting them now. It is not something remote from them that can be left to others to deal with. SGB members, who fail to take ownership of their schools and thus compiling and effectively implementing HIV/aids policies, are dismally failing all educational role-players in desperate need of physical and psychological assistance.

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ANNEXURE A

Form for Informed Consent for Principals

Part 1

As part of my studies for the PhD degree at the University of North-West (Vaal Campus) I have completed a thesis for which I need your assistance. The research consists of the following:

An ecosystemic school governance strategy for combating the impact of the HIV/AIDS epidemic on learners and educators

All I am asking of you is:

to allow me to observe members of your School's Governing Body and to make themselves available for an interview session

Part 2

It is important that you also read and understand the following general principles:

1. Participation in the research is completely voluntary and no pressure, however subtle, will be placed on SGB members to take part.
2. It is possible that you may not derive any benefit personally from this research, although the knowledge that may be gained by means of the study may benefit other persons or communities.
3. You are free to withdraw your consent to the research at any time, without stating reasons, and you will in no way be harmed by so doing. You may also request that any data no longer be used in the research.
4. You will be given access to data upon request.
5. You are encouraged to ask me any questions you may have regarding the research and the related procedures at any stage. I will gladly answer your questions.
6. The project objectives are always secondary to you and your SGB members' well-being and actions taken will always place you and your SGB members' interests above those of the project.

Title of the Research Project:

An ecosystemic school governance strategy for combating the impact of the HIV/AIDS epidemic on learners and educators

I, the undersigned

Full names & Surname

have read the preceding premises in connection with the research informed consent form, and have also heard the oral version thereof and I declare that I understand it. I was given the opportunity to discuss relevant aspects of the project with the researcher and I hereby declare that I am allowing my SGB members to take part in the project voluntarily.

Signature:Date:

ANNEXURE B

CONSENT FORM

Form for Informed Consent for School Governing Body members

Part 1

As part of my studies for the PhD degree at the University of North-West (Vaal Campus) I have to complete a thesis for which I need your assistance. The research consists of the following:

AN ECOSYSTEMIC SCHOOL GOVERNANCE MODEL FOR COMBATING THE IMPACT OF THE HIV/AIDS PANDEMIC ON LEARNERS AND EDUCATORS

All I am asking of you is to make yourself available for an interview session concerning the governance of your school:

Part 2

It is important that you also read and understand the following general principles:

1. Participation in the research is completely voluntary and no pressure, however subtle, may be placed on you to take part.
2. It is possible that you may not derive any benefit personally from your participation in the research, although the knowledge that may be gained by means of the project may benefit other persons or communities.
3. You are free to withdraw from the research at any time, without stating reasons, and you will in no way be harmed by so doing. You may also request that your data no longer be used in the research.
4. You will be given access to your own data upon request.
5. You are encouraged to ask me any questions you may have regarding the research and the related procedures at any stage. I will gladly answer your questions.
6. If you are a minor, the written consent of your parent or legal guardian is required before you participate in this research, as well as (in writing if possible) your voluntary assent to take part – no coercion may be placed on you.
7. The project objectives are always secondary to your well-being and actions taken will always place your interests above those of the project.
8. Should you at any time feel uncomfortable with the questions you have to answer, whether in an interview or in the completion of a questionnaire, please inform the teacher immediately.

Nobody will blame you in any way for withdrawing from participating.

Title of the Research Project:

**AN ECOSYSTEMIC SCHOOL GOVERNANCE MODEL FOR COMBATING THE IMPACT
OF THE HIV/AIDS PANDEMIC ON LEARNERS AND EDUCATORS**

I, the undersigned



Full names & Surname

have read the preceding premises in connection with the project, as explained in **Part 1** and **Part 2** of this informed consent form, and have also heard the oral version thereof and I declare that I understand it. I was given the opportunity to discuss relevant aspects of the project with the researcher and I hereby declare that I am taking part in the project voluntarily.

Signature:Date:

All participants were requested to sign the above informed consent form before being interviewed. Since the names of the participants appear on each form, only a copy of the consent form is attached in order to ensure their anonymity.

ANNEXURE C

INTERVIEW SCHEDULE

(A) Questions about learners who are infected and affected by HIV/AIDS

1. Are you aware of any learners who are infected or affected by HIV/AIDS?
2. If you are aware, what is your school doing to help them?
3. Are you aware of any children in your school who are orphans as a result of HIV/AIDS?
4. If you are aware, what is your school doing to help them?
5. What is the school governing body doing to deal with the HIV/AIDS pandemic at your school?

(B) Questions about educators who are infected and affected by HIV/AIDS

6. Are you aware of any educator/s in your school that are infected or affected by HIV/AIDS?
7. If you are aware, what is your school doing to help them?

(C) Policy issues

8. Have you been trained on developing a school policy which can help to combat HIV/AIDS?
9. If you were trained, who trained you?
10. Does your school have a policy on HIV/AIDS?
11. How was it developed?
12. How often do you discuss HIV/AIDS issues with learners, parents and educators about HIV/AIDS?
13. Who else do you involve from your community in teaching learners and parents about HIV/AIDS?
14. Do district officials of your department of education interact with your school on HIV/AIDS issues?

(D) How do School Governing Bodies think about HIV/AIDS

15. Do you think we will ever find a cure for HIV/AIDS?

16. What do you think should be the role of school governing bodies in helping learners and educators who are infected or affected by HIV/AIDS?

17. Do you think that your school has the capacity to deal with the HIV/AIDS?

18. What else would you like to say about this pandemic which has killed millions in the world?

ANNEXURE D: Observation checklist

Date and time	Predetermined categories	Participant	Situation	Description of the participant's experience	Researcher's reflection (thoughts/ ideas)	Synthesized description of experiences
	Assistance provided					
	Policy development					
	Involvement					
	Perceptions					
	Activities engaged in					
	Processes followed with regard to school governance					
	Coping strategies employed					
	Decision-making processes					