Journal of Vocational, Adult and Continuing Education and Training

JOVACET
Journal of Vocational, Adult and Continuing Education and Training

VOLUME 2
Issue1 2019

higher education & training

Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA

Co-funded by the European Union

UNIVERSITY of the
WESTERN CAPE

This publication was produced with support from the Teaching and Learning Development Capacity Improvement Programme, a partnership programme between the Department of Higher Education and Training and the European Union. Its contents are the sole responsibility of the authors and do not necessarily reflect the views of the Department or the European Union.

Journal of Vocational, Adult and Continuing Education and Training

Volume 2, Issue 1
2019

The Journal of Vocational, Adult and Continuing Education and Training

The Journal of Vocational, Adult and Continuing Education and Training (JOVACET) recognises the need for critical engagement through studies in technical and vocational education and training (TVET) and adult and continuing education and training, and for encouraging critical scrutiny of this expansive knowledge area on the African continent.

The voices and experiences of practitioners, reflecting on all aspects of teaching and learning within vocational education and adult education settings, should be heard through the publication of empirical and robust research. While the journal wishes to take forward academic scholarship, it also seeks to strengthen opportunities for reflective practice that makes a scholarly contribution to the field. New knowledge emerging out of complex developmental contexts has significant value and needs to be showcased beyond existing geographical and political boundaries. The journal is therefore committed to also supporting the development of emerging researchers by providing them with a space to present and defend their research amongst a network of global scholars. Within the field of vocational and continuing education there is substantive 'grey literature' that remains in project report form. The journal is potentially a vehicle for the translation of this important work into an academic contribution to a wider community of practice, thereby enhancing its value.

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EDITORIAL TEAM

ACKNOWLEDGEMENTS

Our guest editors for this Special Issue of JOVACET, Emerita Prof. Shirley Walters and Prof. Zelda Groener, played an invaluable role in lending the journal their considerable experience and expertise in the field of adult and continuing education. We are keenly aware of the time, energy and commitment that their task required, and are enormously thankful for the diligence and rigour that they brought to it.

We acknowledge our reviewers for the insight and developmental critique which they offered without fear or favour. Each journal article is anonymised and subjected to 'blind' peer review by two reviewers, and in this process it is inevitable that variations of interpretation and evaluation occurred, at times resulting in a third reviewer being consulted. We are grateful for the grace with which reviewers engaged and attempted to resolve any sticking points on such occasions. This has served to enhance the quality of our articles, and strengthen our authors going forward.

Thanks to all the authors who made submissions to JOVACET and subjected their work to scrutiny. We trust that you will continue to contribute to this important vehicle for research in vocational, adult and continuing education and training.

Finally, the publication of this Special Issue of JOVACET was again made possible by the Teaching and Learning Development Capacity Improvement Programme which is being implemented through a partnership between the Department of Higher Education and Training and the European Union. We are grateful for this support to our second issue of the journal, Volume 2, Issue 1.

We look forward to the ongoing support of our Editorial Committee and Advisory Board members, who are advocates for JOVACET in the various spheres of their lives, and thank you most sincerely.

FOREWORD

Prof. Joy Papier
Editor-in-Chief, JOVACET
Director: Institute for Post-School Studies
SARChI Chair: Post-School Studies – TVET Teaching and Learning

It gives me great pleasure to present the second issue of our fledgling journal, *JOVACET*, an early 2019 publication. This special issue celebrates a successful conference held in November 2018 in Cape Town and attended by a range of local and international academics. The conference was hosted by the Adult Education Studies Unit of our UWC Institute for Post-School Studies, under the rubric, Access, barriers to participation and success for adult learners: Rethinking equity and social justice in post-school education. It was opened with a thought-provoking address by our keynote speaker, Prof. Crain Soudien, Chief Executive Officer of the Human Sciences Research Council.

As its name denotes, *JOVACET* caters for scholarship in the domains of both vocational education and training and adult and continuing education and training. While each of these is a subfield of education in its own right, with particular epistemologies and traditions, they also have many points of intersection and synergy. The intersections and synergies serve to enrich and expand our understandings of what it means to learn, and teach, outside of formal school contexts. This is especially appropriate to youth and adult learners in general education or young or mature adult learners in technical and vocational education and training (TVET) contexts, whether they are learning formally or informally. Post-school education and training in the 'south' is therefore a vibrant and exciting space for innovative research and knowledge production, for which *JOVACET* hopes to be a vehicle. We also envisage this journal playing a developmental role, where established local and international scholars serve as mentors to and role models for emerging researchers who are seeking to hone their research and publication skills. Such an initiative is sorely needed in what can often be an alienating, even hostile, publishing environment for new scholars.

We are privileged to have had as guest editors for this special issue two highly regarded and experienced academics: Emerita Professor Shirley Walters, former director of the Division for Lifelong Learning at the University of the Western Cape, and Professor Zelda Groener, former director of the Centre for Adult and Continuing Education at the same university. Their roots in adult learning and education run deep, and both are steeped in the discourses that have characterised adult education and training over many years. In the editorial to this issue, they weave a coherent and comprehensive overview of the articles that have been included, articles which have emanated from papers presented at the 2018 conference.

We express our appreciation to the authors who have chosen this publication for their scholarly contributions, and who stayed the distance through the rigorous peer-review process. Your efforts will no doubt be appreciated by our readers, many of whom reside beyond the borders of South Africa and the continent. We trust that you and other aspiring authors will continue to publish in future editions of *JOVACET*.

Our thanks go again to our supportive Editorial Board members for their consistent encouragement, many of whom are on our excellent team of reviewers. Our national and international peer reviewers, who give so generously of their time in meticulous and developmental feedback, deserve our heartfelt thanks too. Be assured that we value your commitment despite the numerous demands you have on your time. Thank you to those who invited academics in their circles to serve as reviewers and passed these referrals on to us. New reviewers are always most welcome, and we ask that you continue to help us widen our network by putting yourself forward as a potential reviewer.

In conclusion, I need again to pay tribute to our journal administrator, Dr Catherine Robertson, for her diligence, tenacity and patience, and for the critical role she plays in getting the journal to publication.

EDITORIAL
SPECIAL ISSUE

Access, barriers to participation and success for adult learners: Rethinking equity and social justice in post-school education

Prof. Zelda Groener and Emerita Prof. Shirley Walters
University of the Western Cape

This special issue of the *Journal of Vocational, Adult and Continuing Education and Training* (*JOVACET*) presents a collection of research papers on adult learners' access to learning opportunities in post-school education and training (PSET). It was prompted by a conference entitled, Access, barriers to participation and success for adult learners: Rethinking equity and social justice in post-school education, held in Cape Town on 24–25 November 2018, where early versions of the articles featured were presented.

Adult learners' access to learning opportunities in post-school education is a critical sociopolitical issue worldwide. Structural conditions have rapidly increased learning opportunities for adults over several decades, but exactly who are adult learners, and which adults have access to these opportunities? What are the barriers to access and success in PSET for a wider, more diverse range of adults? What are the contemporary conditions that limit their opportunities for education and training? What are the organisational and pedagogical strategies that can help them to gain access and enjoy the fruits of success? And how should we rethink issues of equity and social justice in PSET?

These are questions that are addressed in this special issue. Inevitably, the answers are only partial. However, the articles do shine a contemporary light on what continue to be pertinent issues relating to broader sociopolitical, socio-economic and environmental contexts; barriers to access and successful completion; enabling institutional cultures; and supportive pedagogical strategies which can enhance opportunities for epistemological access.

Who are adult learners?

The adult education literature is replete with definitions of who 'adult learners' are. What makes an adult learner different from any other PSET student? Is there a difference? Does it matter?

The authors in this set of articles do not hold a common view. Some use a legal definition of 'adult' which refers to the legal framework in a country that defines someone as 'adult': for example, the age at which a person is allowed to vote, a strictly chronological notion. Articles by Zelda Groener, Jacqueline Lück and Akhona Magxaki refer to 'adult learners' chronologically, which for them includes anyone from the age of 15 years.

However, articles by Doria Daniels, Cari-Ann Roberts Gotta and Liza Hamman reflect the focus of their research as being 'mature' adults, also referred to by some scholars as 'non-traditional' students. These are people who may be older than 23 years; frequently work while studying; have had significant time out from study and have had work or community-engagement experience; and often lack formal access requirements. This definition is not as clear-cut as the former: for example, there may be an 18-year-old mother who is head of her household and therefore clearly carries 'adult responsibilities'.

Depending on the assumptions made about who the 'adult learners' are, policy, organisational and pedagogical responses differ, particularly if widening access to and enabling successful participation in PSET are one's objectives.

Socio-economic, cultural, political and environmental contexts

The articles point to the complex interplay of socio-economic, cultural, political and environmental factors at global, national, organisational and personal levels which contribute to adult learners' access to, and success in, PSET. As the conference on which this special issue is based was held in South Africa and the majority of the participants were from within its borders, it is no surprise that South Africa's particular colonial and apartheid legacies have shaped several of the articles. These relate to the extreme inequalities based on 'race', gender, social class and geography. Crain Soudien, in his keynote address at the conference, described and explored the thwarted aspirations of adult learners in South Africa. He pointed to the rapid growth of the black middle classes, if measured by educational attainment; but he was also at pains to stress how the country's precarious economic situation has thwarted prospects for graduates of higher education institutions (HEIs) and technical and vocational education and training (TVET) colleges. He described the experiences of the majority of black women and men as 'a series of traumatic disappointments'.[1]

1 Soudien, C. 2018. Finding our way through the morass of adult learning in contemporary South Africa: Thwarted social mobility. Keynote presented at the conference, Access, barriers to participation and success for adult learners: Rethinking equity and social justice in post-school education, Cape Town, 24–25 November 2018.

In response to these conditions, which do not enable black South Africans to move into more stable middle-class positions, Zelda Groener, in her article, sketches the conditions of poverty and inequality which create socio-economic barriers that prevent disadvantaged black adults from accessing adult learning and education opportunities. She draws on theoretical frameworks and secondary data to put forward a distributive justice perspective on access to PSET for disadvantaged black adults. These are based on relationships between interrelated equality rights and socio-economic rights, principles of social and economic justice, and redistributive policies. Her analyses reveal a correlation between declining household income and low levels of education among adult heads of households. She concludes that a radical rethinking of policy related to redistribution and social assistance through a social wage stipend is necessary. The new policy should aim to overcome socio-economic barriers, and, in doing so, offer black adults a 'route out of poverty and inequality' while also achieving socio-economic justice.

In contrast to Groener, Cari-Ann Roberts Gotta, who is based in rural Canada, argues that what is needed to increase participation in adult education is not necessarily greater resources. She identifies many positive strategies that are in place to enable flexible access to learning, but she indicates that these are not proving sufficient to increase participation. She argues that, in addition, there needs to be an ideological shift: from one valuing education solely as a means to employment towards another that values education also for its role in fostering individual and community development. She argues for challenging the hegemony of the economistic, labour market orientation of educational provision and replacing it with an approach aimed at broadening interest and participation in adult learning as a means of attaining equality and justice.

Jacqueline Lück and Akhona Magxaki focus on the complexities and contradictions of language in a multilingual environment in which the colonial legacy of English has pride of place, a situation which seriously limits the success of learners. While their research is located in a Life Orientation class at a TVET college in South Africa, it has resonance for many PSET institutions in multilingual contexts. Their case study examines perceptions of student English language proficiency and the impact of English on student participation and success in Life Orientation, a subject that seeks to enhance students' academic and life success and resilience.

Life and academic success and resilience are echoed in the subject of the research conducted by Doria Daniels: the measures adopted by Somali refugee mothers to support their children's educational success. Her article highlights the exceptional struggle of refugees who have to navigate complex cultural, language and political terrains in order to achieve literacy and support their children's education. In her narrative enquiry, she researches four refugee mothers' life experiences and beliefs about education, analysing their testimonies or stories of political agency in order to understand the intersectionality of gender, language, ethnicity and power. She explores their personal empowerment and the community cultural wealth that the women have accumulated on their journeys to becoming literate. The mothers are

adult learners who use intergenerational and peer-to-peer strategies to acquire the confidence and skills to support their children's education. The research vividly demonstrates family literacy at work. It also emphasises the importance of the interactions between home and school to enable access and success. The mothers as adult learners are important role models for their children.

In contrast, and a world away from that situation, the patriarchal institutional contexts that predominate in PSET institutions have led René Bonzet and Liezel Frick to construct a conceptual framework for analysing the gendered experiences of women in TVET college leadership. They argue that gender inequalities hamstring the leadership structures in TVET colleges in South Africa and result in a dearth of women leaders at the colleges. The article raises gender-related issues that are relevant to the entire TVET college sector, including its current and future leaders, decision-makers and policy developers. They argue for changes in institutional cultures so that they begin to embrace a diversity of women, men and LGBTIQ adult learners.

In the thought piece, Shirley Walters focuses on ways in which environmental factors are increasingly bearing down on and exacerbating the already difficult situations of access and success, particularly for poor, marginalised adult learners. Referring to current climate crises that are occurring daily around the world, she suggests ways in which PSET institutions, their staff and students can respond in order to mitigate these conditions. There is no doubt that socio-economic and political contexts are being reshaped increasingly by climate crises and catastrophes, and these upheavals have the greatest impact on poor and vulnerable people worldwide.[2] Southern Africa is a 'climate hotspot'; therefore, the impact is anticipated to be even more severe for this region in the coming decades – a trend that may well exacerbate poverty, violence, food insecurity and inequalities generally.

While not comprehensive in their coverage of the conference theme, the articles point to the multiple, interlaced socio-economic, political and environmental conditions that governments, educational institutions and individuals are immersed in and to which they are compelled to respond.

Enhancing equitable access for a diversity of adult learners

As intimated above, for the majority of poor, marginalised adult learners and potential learners there are many structural socio-economic, historical, cultural and political barriers to access and success. There are also epistemological barriers. These are approached through embodied learning as presented in the articles by Ephraim Nuwagaba and Emmy Oreh, and Liza Hamman.

2 Walters, S. 2018. 'The drought is my teacher': Adult learning and education in times of climate crisis. *Journal of Vocational, Adult and Continuing Education and Training*, 1(1).

Ephraim Nuwagaba and Emmy Orech's study is of students with hearing disabilities at Kyambogo University in Uganda. They show how good relationships helped students to learn, to cope with challenges to learning, to access learning materials and academic support, and to embrace diversity. Delayed communication, especially that via interpreters and by teachers who did not entirely accommodate their needs, had a negative influence on their academic relationships. The findings about learning together with and from other learners, they argue, confirm the importance of ubuntu's notion of 'shared collective humanness and responsibility'. They also confirm that the social model of disability can overcome barriers to learning and that sound academic relationships were contributing to these efforts and helping adult learners with hearing disabilities to access education and to succeed.

The importance of inclusive pedagogies is also the focus of Liza Hamman's paper. She points out that the academic literature relating to adult education and learning reveals the dominance of a cognitive, rational approach to how learning takes place in Western culture. A holistic approach to adult learning, which includes the body and the emotions, is often marginalised despite there being growing support for the inclusion of the latter. Her study reports on learning during a Mindfulness-Based Stress Reduction (MBSR) Programme for adults. She analysed her data using transformative learning theory as the lens and found that mindfulness inspires embodied learning, which creates a new awareness of the body and the emotions. The data show that embodied learning often motivates new activities among adult learners, indicating transformation. Her findings suggest that embodied learning through mindfulness should be included in adult learning settings to complement rational, cognitive knowledge acquisition. She proposes that embodied learning be more prominent in theory building as it relates to adult education and learning. This, she holds, will promote a more holistic approach to adult education and learning, which, in turn, will enable and enhance access to knowledge in its many and varied forms.

The need for broadening what counts as 'really useful knowledge' is also emphasised by Walters. With rapid changes in climatic conditions occurring in the form of droughts, floods and fires, which endanger both lives and livelihoods, the people who are most accustomed to 'living on the edge' are poor and vulnerable people. It is their knowledge and expertise, Walters avers, that needs to be affirmed: there are many communities whose indigenous knowledge has been sidelined in curricula and this needs to be reclaimed if mitigation strategies are to succeed. She highlights the pervasiveness of trauma which many in the PSET environment experience. To deal with it requires a shift of emphasis to what she refers to as 'heartfelt pedagogies' that enable diverse learners to feel included and 'at home'.

Rethinking equity and social justice

How do these articles throw light on strategies aimed at 'rethinking equity and social justice'?

The articles of Groener, Lück and Akhona Magxaki, and Gotta put forward ideas about rethinking equity and social justice that are policy-related. Groener identifies socio-economic

barriers that undermine disadvantaged black adults' access to adult learning opportunities. To achieve equity and distributive justice, she proposes redistributive policies that facilitate access to adult learning and education through a social wage stipend. Lück and Akhona Magxaki's findings indicate that limited spoken and written English was a major barrier among students at a TVET college. According to them, rethinking equity and social justice should include a consideration of more inclusive language policies in education. Valuing adult learning solely as a means to employment among adults in small communities is implied by Canadian policies, according to Gotta, who suggests that understandings of the purpose of adult education should be shifted in ways that promote adult learning and education as a vehicle for equity and justice.

Bonzet and Frick's analysis exposes family roles as one of the barriers to the advancement of women's professional careers at TVET colleges. They recommend changes in institutional cultures that advocate all-inclusive approaches which advantage both women and men in TVET college leadership positions, and suggest that a ubuntu-based leadership style emphasising mutual interdependence should be pursued.

In similar vein, changing institutional cultures is promoted by Nuwagaba and Orech through their advocacy of a social model of disability that incorporates the philosophy of ubuntu. This is understood to be a 'shared collective humanness and responsibility' that has been trialled effectively to overcome a hearing-disability barrier among university students.

In Daniels' research, English illiteracy among immigrant parents presents as a barrier to their children learning the language. She therefore suggests a shift towards family literacy pedagogies that could both facilitate adult literacy in the medium of English among immigrants and bring about equity for themselves and their families.

Hamman's research shows that mindfulness can enable adult learners to confront learning barriers that result from negative emotional experiences and various forms of trauma. By incorporating mindfulness and embodied learning into transformative learning pedagogies, different ways of learning and access to different knowledge can be effected.

Finally, accelerated climate change and its consequences for the survival of humanity, according to Walters, require urgent political, organisational and pedagogical responses throughout the PSET system. As Greta Thurnberg, the young Swedish climate justice activist, urges: we must respond as though our house is on fire!

Concluding thoughts

The articles in this special issue suggest that global, regional, national and institutional environments, and our responses to them, will either aid or hinder opportunities for rethinking equity and social justice for adult learners in PSET. Access and success for a diversity of adult learners across social class, 'race', gender, physical ability, geographic location, language and ethnic background require a rethinking of national and institutional

policies and frameworks to challenge the barriers that continue to prevail. Considering the wide range of barriers, including both structural and individual, we in this sector will have to devise and contribute to the integrated strategies that will be required to deal with the conditions responsible for these constraints. These articles also demonstrate that carefully considered organisational and pedagogical interventions can contribute importantly to this endeavour.

Towards a conceptual framework for analysing the gendered experiences of women in TVET leadership

René Bonzet and Liezel Frick
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ABSTRACT

Gender inequalities handicap leadership structures in technical and vocational education and training (TVET) colleges in South Africa. TVET women leaders' gendered experiences are, first, intrinsically connected to both a professional career in TVET and family roles – the two being mutually inclusive – and can, secondly, be linked to three career pathways, namely learning, acquiring and performing leadership roles. Based on the relevant literature, the authors present a conceptual framework where themes include: such women leaders' demographically influenced experiences; the stages in becoming a leader; gender-related notions and challenges; leadership contexts; and strategies for managing gendered experiences. Based on Maritz's business coaching model, the framework contends with factors that may influence the current lack of women in TVET leadership. This article raises gender-related issues that are relevant to the entire TVET college sector, including current and future leaders, decision-makers and policy developers.

KEYWORDS

TVET; technical and vocational education and training colleges; conceptual framework; gender inequality; gender transformation; women in leadership

Introduction

Although the notion of women's participation in leadership has received substantial attention nationally and internationally, there is still a considerable way to go in advancing gender equality (O'Connell & Gavas, 2015), as women striving to become leaders continue to face gender discrimination and inequalities in the workplace (Dlamini, 2013). Gender quotas constitute one policy tool that has been designed to increase the representation of women in leadership (Foster, 2011; Pande & Ford, 2011; Dlamini, 2013). South Africa has formalised gender quotas to comply with its international commitments (RSA, 2013a). However, a census of the South African Businesswomen's Association indicates that women are still under-represented in both private- and public-sector leadership positions (Oberholster, 2015). These findings are also true for educational leadership globally (Moltz, 2011; Walker, 2013).

As recently as June 2019, despite legislation and policy initiatives regarding gender equality, technical and vocational education and training (TVET) colleges in the South African public sector only had 17 women principals nationally out of a possible 50 such positions (DHET, 2019). Although there are currently three men and three women principals in the TVET colleges in the Western Cape province, for example, the ratio among the rest of the senior management staff (deputy principals, campus managers, academic heads, and portfolio managers) is still disproportionate in such individual colleges (for more details on the context, see Bonzet, 2017; Bonzet & Frick, 2019).

TVET colleges in South Africa have a history of drawing instructors from male-dominated sectors of industry; it is therefore not surprising to find men also predominating in TVET leadership positions. Thus, the Department of Higher Education and Training affirms that TVET college management should be transformed (DHET, 2017).

Moreover, Dlamini (2013) maintains that in-depth studies of South African women leaders' life stories are deficient and that frameworks which enable the analysis of such stories are limited (Moodly & Toni, 2017). Contextually sensitive frameworks provide a point of departure against which future research in this area can be reflected. The studied literature on women leaders' gendered experiences depicts frameworks that illustrate the relationship between gender and leadership – for instance, leadership approaches (Stout-Stewart, 2005), career pathways (Acker, 2012), environmental factors (Doubell & Struwig, 2013), barriers to women's career progression (Walker, 2013), and intersectionality concerning race, gender and class (Dlamini, 2013). However, limited additional and/or relevant notions of leadership as it pertains to vocational education and training are covered in each of these existing frameworks. The purpose of this article is therefore to resolve the current lack of a coherent, contextually sensitive conceptual framework encompassing all of the above notions in a non-empirical manner by conceptualising gendered experiences in a vocational leadership context. We start the article by providing the methodology, followed by a context-sensitive, heuristic conceptual framework that addresses this current

gap in the South African TVET literature. We then proceed to unpack the different dimensions of the framework itself, which was developed through a conceptual analysis of the relevant literature as cited above. We conclude by challenging other researchers in the TVET field to use this framework as a point of departure to make sense of the current TVET leadership realities in South Africa.

Methodology

In attempting to encapsulate the gendered experiences of women leaders in public TVET colleges in South Africa, we conducted a Google Scholar search in January 2019 across disciplines to find relevant literature published in the period 2000 to 2019. Google Scholar was selected as the search engine for this study as it has a wide-ranging coverage and an advanced search function which can be used to delimit searches more accurately by keywords, authors, publications and time range. It allows for results that cover a wide variety of materials, including articles, books, book chapters and conference proceedings. Although we acknowledge that Google Scholar is not the only or a fully comprehensive search engine (no existing search engine is), it is one of the most wide-ranging search engines currently available. Since research related to gender and leadership cuts across disciplines and genres, it was important to use a search engine that includes an expansive range of literature, as is the case with Google Scholar. Even though Google Scholar includes so-called grey literature and does not provide criteria for what makes its results scholarly, we, as active researchers in the field studied, were able to judge the scholarly merit of sources presented to us during our searches. We excluded sources where the full text was not available in English and also non-peer-reviewed articles, although conference papers were taken into account. By using the search terms 'TVET colleges' AND 'South Africa' AND 'educational leadership', we retrieved a total of 53 sources. A further delimitation – AND 'women/gender equity/gender transformation' – reduced the retrieved sources to 20. Then we conducted another Google Scholar search using the search terms 'TVET colleges' AND 'South Africa' AND 'women leaders'/'female leaders', but retrieved only six. Consequently, it was pointless to delimit any of the last two searches further to include only articles and books, because saturation had been established.

In total, 82 references were included in producing this article, but we had to use separate notions during our search and cast the net wider than South Africa and TVET to retrieve relevant sources. The selected texts were interpreted, focusing on excerpts that contained the terms 'TVET' / 'vocational education' / 'higher education' / 'leadership' / 'gender equity' / 'gender transformation' / 'wom*n' / 'female' / 'feminine' / 'LGBTIQ', the latter being an abbreviation representing lesbian, gay, bisexual, transgender, intersex and queer/questioning communities (Greenblatt, 2011). We employed *an informal approach* in the interpretative process (Peräkylä & Ruusuvuori, 2005). Contrary to other methods of text interpretation, the informal approach is not dependent on coding schedules, but is rather guided by the interpreter's free and sensitive engagement with the text. In such an analytical approach, the authors' positionality and reasons for undertaking a review such as the one presented here, need to be

clarified. We have approached this study from the position of both practitioner and researcher and build here on the interplay between empirical and non-empirical research. We have previously reported empirically on results from a narrative study conducted in the TVET sector (see Bonzet & Frick, 2019), but saw the need to extend our conceptual work further (which is what is presented here). Although we believe that many more, different types of research on gender and leadership in vocational education in the (South) African context are necessary, the work presented here adds to a small but growing body of scholarship in this area. What is more, Peräkylä and Ruusuvuori (2005:870) argue that approaching texts informally is particularly applicable when analysing written texts. They explain further that

> [i]n many cases, qualitative researchers who use written texts as their materials do not try to follow any predefined protocol in executing their analysis. By reading and rereading their empirical materials, they try to pin down their key themes and, thereby, to draw a picture of the presuppositions and meanings that constitute the cultural world of which the textual material is a specimen.

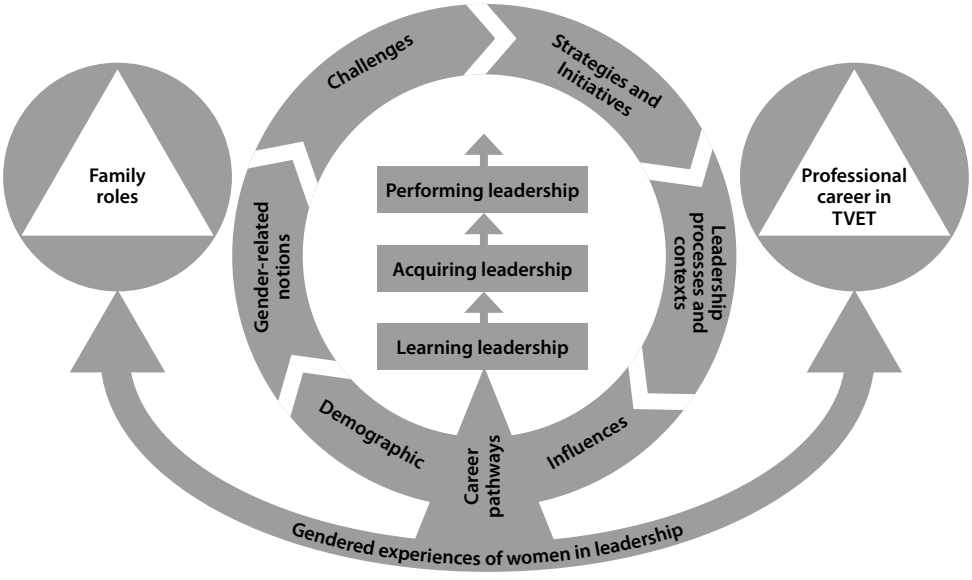
In our case, the key themes entailed typical meanings of women in TVET college leadership and their gendered experiences as they appeared in the selected literature. These themes were then linked to multiple facets that influence women leaders' experiences, including: such women leaders' demographically influenced experiences; stages in becoming a leader; gender-related notions; challenges; leadership contexts; and strategies for managing gendered experiences. These facets or theoretical notions, and other relevant literature, informed our interpretation. As a result, a framework of six key links could be identified, as outlined below.

Towards a conceptual framework

Women are not a homogenous category and, furthermore, there are differences in race, age, and so on that influence the ways in which gender transformation in TVET colleges is experienced. In addition, the notion 'gendered experiences' could include transformation, discrimination, stereotyping, diversity management, intersectionality, and the LGBTIQ community. Owing to the extensive nature of the different experiences of women in leadership positions, less attention was paid to particular notions during the design of the conceptual framework (Bonzet, 2017). Based on Maritz's (2013:7) business coaching model that provides a positive intervention in building and supporting management capability, the framework contends with factors that may influence the current lack of women in TVET leadership. Conceptualising women leaders' experiences is multifaceted, and they are concretised in the framework presented in Figure 1.

Figure 1 depicts the ways in which the gendered experiences of women leaders in public vocational education are intrinsically connected to both a professional career in TVET and family roles – the two being mutually inclusive. It also shows their experiences can be linked to three different career pathways. Thus, gendered experiences may be influenced by the way in which women balance their family roles and their professional careers. Also, these gendered

Figure 1: Framework for interpreting the gendered experiences of a women leader on her career pathway at a public TVET college (adapted from Maritz, 2013:7)



experiences could emerge at all three phases of their career paths, namely learning, acquiring and performing leadership. Lastly, experiences could be influenced by demographics, gender-related notions, challenges, and leadership processes and contexts. Furthermore, strategies and initiatives for advancing their careers are recommended. Although the proposed framework above pre-suggests possible outcomes, Walker (2013:107) maintains that the purpose of a heuristic framework is to postulate themes and trends to assist in producing findings. Saldana (2013:175) refers to 'theming the data' as part of the 'codus operandi' (Saldana, 2013:26) before the findings can be re-storied by means of a specific plot structure (Ollerenshaw & Creswell, 2002).

From the literature studied, it became clear that a gendered perspective on leadership is not easily established and that scholars differ in their conceptualisation of it. It may therefore require a closer consideration of what 'gender' itself may mean; gender as the first concept of the proposed theoretical framework will accordingly be discussed next. When conceptualising gender transformation, diversity management and intersectionality also need to be clarified, as these notions are closely related to the notion of gender. Then we conclude this section with an explanation of gender stereotyping.

Conceptualising gender

Nazar and Van der Heijden (2014) depict gender as a critical variable in career progression and an approach to work, yet there is often not conceptual clarity on what is meant by the term. Haque (2011) highlights two notions of gender: a sexual categorisation (focusing on the

biological human dissimilarity), and socially constructed gender. While Risman (2004) labels gender as a social structure (behavioural habit), Priola (2007) argues that social interactions imply gender (sexual type, masculine/feminine traits) and that cultural rules infuse gender. These varying conceptualisations have implications for the enactment of gender-based policies and practices in the workplace.

Gender, according to Priola (2007:29), defines the woman leader as 'a specific gendered subject position by the contingently-determined context who is continually judged because of her gender'. Disputes among colleagues burden a women leader's feminine subject position (perceived as soft/weak/emotional), while the male leader's battles are believed to be determined by 'objective' (Priola, 2007:29) reasons owing to the masculine subject position being seen as powerful and related to logical and competitive dialogue. Haque (2011) puts gender in an analytical framework that helps us to denaturalise men or women and masculinity/femininity, seeing them as socially constructed (rather than by birth) and therefore different through time and place. Gender is therefore an interpretation of relations of dominance and marginalisation, and of hierarchy oppression as productive of gender identities, ideologies and practices. It follows that knowledge and experiences of being a man/woman as social practice are linked to power, which explains why Risman (2004:446) calls for the labelling of women as subordinates to be deconstructed.

However, beyond the binary sex–gender system with its perceptions of women and men, one needs to consider the notions of sex as male, female and a diversity of sexes, and gender as men, women and a diversity of genders (Strachan & Van Buskirk, 2011). Consequently, since the 1990s, the binary concept of sex and gender has steadily been reconceptualised. Gradually, it is acknowledged that, by birth, one can be born a male, female, or intersex, and one can grow into men, women, or members of the LGBTIQ community (Greenblatt, 2011). With this acknowledgement, it seems clear that the elimination of discrimination against women, specifically discrimination on the ground of the female sex and gender identity, is insufficient and should include sexual orientation. In doing so, it is important to take into account that the domination of heterosexuality creates different hierarchies of power within institutions.

From the literature studied, it is evident that gender refers to more than merely the biological difference between men and women. Gender concerns men, women, and members of the LGBTIQ community and, given the context of TVET in South Africa, may be a socially constructed notion of the masculine, feminine, or LGBTIQ community traits (Bonzet, 2017). Having dealt with gender as a concept, the need arises to explain gender transformation, diversity management and intersectionality too.

Gender transformation in the South African TVET sector

Transformation towards diversity became a key focus in South Africa after the advent of democracy in 1994 (Joubert & Martins, 2013). Besides the racial apartheid that had been entrenched since 1948, Dlamini (2013) points out that there were other entrenched constraints against diversity: for instance, *all* women were forbidden to buy property; married women lost

their permanent teaching positions; pregnant staff had to resign; and between males and females, married and unmarried, salaries were unequal. The Employment Equity Act (RSA, 1998) brought about some racial transformation, but the Women Empowerment and Gender Equality Bill (RSA, 2013a) was passed only much later. The gender transformation process in TVET started with the passing of the Further Education and Training (FET) Colleges Amendment Act (RSA, 2012) and was formalised by the White Paper in 2013 (RSA, 2013b). These addressed, among other matters, gender inequality. Since then, TVET management has had to design, renew and submit a gender equity plan annually to their respective college councils for approval. Yet, according to Dlamini (2013), two decades after democracy, racial inequality still supersedes gender inequality, literature on gender is lacking, and gender transformation is still incorrectly monitored in terms of numbers only. Gender injustices furthermore differ from one structurally diverse group to another, such as geographical setting, parentage, gender, race, income and religion (Akala & Divala, 2016). Gender discrimination therefore latches on to the concepts 'diversity management' and 'intersectionality'.

Diversity management and intersectionality

Diversity management involves recognising and managing individual differences (Gilbert, Stead & Ivancevich, 1999). Furthermore, diversity encompasses race, gender, culture, age, ethnic group, personality, tenure, organisational function, education, cognitive style and background. The interconnected nature of these social categorisations justifies the use of the notion 'intersectionality': the theory that the overlap of social identities contributes to the specific type of oppression or discrimination experienced by an individual where two or more are interdependent (Gilbert et al., 1999; Dlamini, 2013). Using gender as a unit of conceptualisation highlights the complexities and categorisations that women in TVET leadership positions contend with daily. Moreover, it is inevitable that categorisations are used in society, often making way for yet another gender-related notion, namely stereotyping.

Stereotyping

Fiske (1993) defines gender stereotypes as mental shortcuts by which people assign a distorted view of a person. People's perceptions of women are often informed by stereotypical beliefs, such as the view that women are too emotional to handle leadership positions (Gouws & Kotzé, 2007). Thus, Diaz Garcia and Welter (2011) note that women have to escalate their performance constantly to be valued in a male-dominated environment such as the building industry – a notable component of the TVET college sector. For this reason, gender stereotyping often disadvantages women who aspire to achieve high-profile positions (Grant, 2012).

The gendered shaping of educational leadership is entwined with stereotyping (Doubell & Struwig, 2014). Lumby and Azaola (2014) state that men are believed to portray autonomy, whereas women are stereotyped as having caring traits which, thanks to stereotyping, are considered unfavourable to leadership success. Furthermore, Risman (2004) warns against gender-stereotypical labelling, such as women being regarded as subordinate to men. This form of power ranking nurtures stereotyping, while the stereotyping itself maintains power. According to Fiske (1993), stereotyping and power are mutually reinforcing: stereotyping itself suggests

control, upholding the status quo. As gender stereotypes are rooted in gender practice which supports the notion that leaders should be men (Diaz Garcia & Welter, 2011), by the time women become leaders they either intrinsically believe that power lies outside themselves (Debebe, 2011) or that they should perform like men (including any other stereotypical interpretation of masculinity) in order to be regarded as powerful (Wiley & Eskilson, 1985). On the other hand, stereotyping also restricts career progression for those men who display a different way of being that is not regarded as powerful or hypermasculine (Greenblatt, 2011).

The literature suggests that various gender-stereotypical views are assigned to leaders, which may affect the experiences of women leaders at TVET institutions and limit their career-progression opportunities more than those of their male counterparts. Furthermore, gender stereotyping often depicts women as lacking the very qualities commonly associated with effective leadership; therefore, in order to consider the narratives of TVET women leaders' gendered experiences, leadership is conceptualised as the second notion of the proposed theoretical framework.

Leadership: A gendered perspective

Leadership is defined as a process in which a leader engages followers to share his or her vision and strategy, and to successfully implement and achieve the goals of that same vision (Gaunt, 2006). Robertson (2015) defines leadership as a set of behaviours that inspires followers. Leadership for Clarke (2009) is a unique demeanour when interacting with followers and entails, for example, skill, relations, change, contextual factors, dialogue, growth and interaction. These notions are encapsulated in the local community concept, ubuntu (from a Nguni proverb meaning 'humanity to others' or 'a person is a person through other persons' (Eze, 2008:388)). Thus, by adopting ubuntu leadership practices of mutual dependence, the ethic of African humanism is strengthened constantly (Khoza, 2012) and links to another South African leadership concept, Batho Pele, meaning 'people first' (Khoza, Du Toit & Roos, 2010:58). Therefore, just as leadership can be seen as a process that includes a leader, followers and a context influencing the leadership process, Pierce and Newstrom (2006) regard the leadership process as an interactive relationship between leader, follower and context, yielding a specific outcome. Robertson (2015) therefore argues that leaders at TVET colleges should adopt a shared-leadership approach in which leaders have a shared role of being both leader and follower, thus sharing power in support of the distributive leadership style. This exploration of some theoretical understandings of leadership now calls for a more contextual approach to leading, underpinned by gender diversity. The focus in the next part of this section is thus on leader traits and approaches with specific reference to the role of sex and gender in the leadership equation.

From a gendered perspective, if the leader is a woman in a male-dominated context (e.g. a TVET college campus with men lecturing in motor and diesel mechanics), the outcomes may be adverse, although, according to Lumby (2015), this is a complex issue with counter-

arguments that a woman's accomplishments can outweigh adversity (e.g. a woman campus manager who previously owned a diesel-truck transport company). These examples illustrate that the relationship between gender and leadership can be complex, and the literature indicates that debatable views about gender and leadership exist. A few social scientists maintain that leadership styles are gender-specific (White & Özkanlı, 2010), but most have agreed that no specifically different behavioural patterns can be discerned in the leadership approach of women compared with men as leaders (Baril, Elbert, Mahar-Potter & Reavy, 2006). Yet, there are scholars, such as Booysen (2001) and Pierce and Newstrom (2006), who argue that leadership styles are gender-stereotypical. The implication is that women leaders' traits are generally participative or intuitive as opposed to those of men (which are domineering and competitive). First, although controversial, Pierce and Newstrom (2006) note that scholars ascribe different leadership style preferences to men and women. Interpreting democratic (so-called women leaders' preference) versus autocratic approaches (so-called male leaders' preference), Eagly, Johannesen-Schmidt and Van Engen (2003) argue that followers are more irritated with women (as opposed to men) who focus on autocratic leadership approaches. In other words, women followers would rather tolerate autocratic men leaders than autocratic women leaders (Eagly et al., 2003). Secondly, Pierce and Newstrom (2006) state that different approaches might be caused by different gender traits, but could also be perceived as role requirements. Power imbalances influence conduct, which coerces women to revert to a rigid approach (Mauthner & Edwards, 2010). Furthermore, leading is affected by gender congeniality, shaping sex differences according to task style (Eagly & Johnson, 2006) – meaning that men become more task-oriented if the leading function is more male-friendly, whereas women are more task-oriented if the role is female-friendly. This would indicate that a relationship exists between gender diversity and context.

The literature indicates that some scholars offer a distinct view of gender and leadership, arguing that women and men may lead in different ways; other scholars maintain that demarcating leadership styles on the basis of gender alone is perhaps too simplistic and does not consider contextual variables, such as a woman leader on the campus of a male-dominated TVET college where engineering is the dominant discipline. In addition, different contexts call for different leader behaviours: one leadership approach simply does not attend to the needs of all followers, nor does it necessarily work for all situations in which leaders and followers find themselves. Thus, overgeneralising gender difference in leadership styles may be unwise, even though it seems to help clarify types of gendered expectations that may influence women in the leadership structures of TVET colleges. Women are still under-represented in this setting despite legislation and, although affirmative action has been embraced by most colleges, new appointments of women in the top structures may signify tokenism instead of significant leadership success on the part of a woman (Pande & Ford, 2011). Women's experiences of their career journeys towards leadership are complex and often unforeseen, and they change as they progress. As gender imbalances still exist in the TVET sector, a further overview of the career paths of women leaders is warranted – yet another facet in our conceptual framework.

Career pathways: Experiences with gendered implications

Moorosi (2010) and Acker (2012) promote a strategically planned career route. Both found that women experience discrimination at different phases in their careers. Thus, Moorosi (2010) modified Van Eck, Volman and Vermeulen's (1996:403) 'management route model', an analytical framework for gender concerns in educational leadership. Moorosi's model identified three phases that educational leaders encounter during their career, namely anticipation, acquisition and performance. Initially, potential leaders equip themselves through furthering their postgraduate studies, attending workshops and participating in colloquial networks (anticipation). The second phase (acquisition) is typified by potential front-runners pursuing access into positions of leading. Regrettably, this is the phase categorised by high discrimination (Blackmore, 2013) and often sabotaged through unfair stereotyped selection criteria that withhold women from top positions (Moorosi, 2010). In the third (performance) phase, women are under-represented. And those who do attain a position of leadership may lack the networks and support systems that are often imperative to success in this phase (Moorosi, 2010).

In contrast to Moorosi's (2010) interpretative approach using semi-structured interviews to identify the career phases, Acker (2012) presents her own encounters as president of a Canadian university, through a narrative approach. Like Moorosi (2010), Acker (2012) provides three frames of analysis: learning leadership, surviving organisations and performing leadership – all of them with gendered implications – to interpret her own story. To begin with, Acker (2012:412) explains how she gained leadership skills by incorporating the feminine inclination to care and share, which she refers to as 'women's ways'. Secondly, she explains surviving organisations as a phase in which the woman leader operates in an organisational culture where masculinity still permeates most of the leadership approaches. In this phase, she endures masculine hierarchies, the preservation of gender segregation, the marginalisation of women, and discrimination. Furthermore, workloads, domestic/family duties and intensified accountability may adversely impact on the woman leader. Acker (2012) highlights the notion of a glass ceiling and defines it as an unseen obstacle within a chain of command that precludes women from top leadership positions regardless of their abilities. Her last phase (performing leadership) expands on the gendered organisation approach, providing the metaphor of an actor 'doing gender' (Acker, 2012:423) in order to survive in the conventional masculinist leadership culture.

A theoretical understanding of a strategically planned career route which sheds light on the complexities that potential women leaders at TVET colleges may encounter on their way to top leadership positions may serve to change existing perceptions among the authorities concerned when drafting legislation in this sphere. From the literature it becomes more and more evident that gender transformation should not be legally recognised in terms of equal numbers only. The above conceptualisation of gender pathways confirms that the women who journey towards leadership positions may be influenced by challenges that are different from those of men, including personal, institutional and social dynamics (Moorosi, 2010). Suter (2006:95) talks

about 'a complex interplay of factors operating at individual, interpersonal, organisational, and societal level'. The *factors* affecting the career journey therefore need to be clarified conceptually too, and this is therefore one of the central facets at the base of the proposed framework.

Demographic factors influencing experiences: Biographical, cultural, organisational

Hall (1997) posits that biography is key to understanding women leaders' performances, which are rooted in childhood, educational and career experiences that cannot be separated from their gender identities. Furthermore, culture – explained as the intersection between race, gender, class and disability – and organisational demography play a role in the career progression of women leaders, which is the focus of the remainder of this section. To begin with, Doubell and Struwig's (2014) research framework highlights biographical demographics that may influence the career pathways of women, such as their age and birth order, the gender of their siblings, their ethnicity, their and their parents' education, as well as their marital status and the number and ages of their children. Although family obligations do not necessarily hinder career progression, Risper (2011) concurs that relocation does pose a problem to women leaders with children. Moreover, work–life balance becomes a problem if the dependants are under 13 years of age, or there are more than two siblings (Risper, 2011). In addition, dual-income families are becoming the norm, placing greater demands on women leaders who need to balance their work and family roles in the absence of family-friendly policies at many institutions (Suraj-Narayan, 2005).

Secondly, racial discrimination, violence against women and a patriarchal society plague the South African organisational culture by depriving women of leadership positions – often in subtle ways (Van Wyk, 2012). Cultural traditions (Maseko, 2013), disability, and generational perceptions (Dlamini, 2013) may furthermore privilege hypermasculine men (Maseko, 2013), and this partiality is often strengthened through affirmative action legislation in South Africa (RSA, 1998). Blackmore (2013) and McNae and Vali (2015) support the notion that ethnicity is still a debilitating factor for women when it comes to career progression. Blackmore (2013) affirms that the way gender, race, religion and class interact is not sufficiently highlighted in the mainstream educational leadership literature. This is also evident in Maritz's (2013) model that was used as a basis for the conceptual framework presented in this study. As an intersectional approach was beyond the scope of the study that this article draws on (Bonzet, 2017), only limited attention was paid to these notions. However, this conceptualisation provides the basis for further work and critique that should bring a more intersectional analysis into prominence in the debate about gender and leadership.

Thirdly, research on organisational demography by Ely (1994) indicates that competitiveness and envy among women inhibit teamwork in male-dominated workplaces, while imbalanced job specifications, a lack of flexible working hours (Auster, 2001) and the absence of family-friendly policies, on-site day-care centres, care facilities for sick children, and support groups for employed parents (Suraj-Narayan, 2005) may further inhibit women's career progression. The issue of gender inequality is universal in nature, with issues such as accessible, affordable

childcare which is needed before women can participate effectively politically and economically, remaining unresolved.

But, apart from the abovementioned demographical influences such as biography, culture and organisational demography, there is a dichotomy between the woman leader's family roles and her professional career in TVET that might restrict her from obtaining top positions. Figure 1 depicts how the gendered experiences of women leaders in public vocational education are intrinsically connected to both a professional career in TVET and family roles – the two being mutually inclusive. Thus, gendered experiences may be influenced by the way in which women leaders in TVET colleges balance their family roles and their professional careers.

Dichotomy between family roles and a professional career in TVET

Globally, women express frustration regarding a twofold burden encountered in the leadership culture of educational institutions (White, 2003). Although all leaders face challenges (White, 2003), Diaz Garcia and Welter (2011) argue that many women who are in leadership positions may, in addition, be confronted with two conflicting discourses, namely:

- a professional career, and
- family roles.

Vinnicombe and Singh (2003) maintain that this twofold burden may restrain career progression. Also, work–family conflict and domestic duties after work may be detrimental to the woman leader's health (Ng & Fosh, 2004). Suraj-Narayan's (2005) study reports that these conflicting roles are linked more to leaders with a higher blood pressure than to those with lower job strain. Moreover, their workload could result in burnout, as Karanika-Murray, Bartholomew, Williams and Cox (2015) explain. Women often face discrimination; as a result, they tend to develop more coping skills than men (Eagly et al., 2003), which, in turn, may coerce them to work even harder (Risper, 2011). Women may end up lecturing (rather than leading), given the possible leeway it may provide to combine work and raise children (Hall, 1996). Because in-depth studies of South African women leaders' life stories are limited and women remain under-represented in leadership positions at TVET colleges, the twofold burden of family roles and a professional career in TVET might not be the only reason why there is a dearth of women in top leadership positions. For this reason, *challenges* – another notion in the proposed conceptual framework – may affect the career progression of women in leadership, and they are therefore explored next.

Career-progression challenges of aspirant women leaders

Walker (2013) lists the following as barriers to women's career progression: sexism, isolation, racism, lack of role models, long working hours, role-identity transformation, lack of self-belief and tokenism. Nieman and Nieuwenhuizen's (2014) list includes limited assistance, negativity towards cultural or ethnicity differences, individual adversities and a lack of funding (for the

necessary postgraduate studies). Moreover, Pande and Ford (2011) argue that, with the limited availability of leadership opportunities, many working women are reluctant to fund their own (often costly) postgraduate studies – even more so in South Africa, where free education is currently demanded by and earmarked mostly for members of the formerly disadvantaged communities and only for full-time students at the undergraduate levels of study. In addition, Walker (2013) avers that TVET college portfolio managers in marketing, finance, student support, and human resources have reached the so-called glass ceiling and battle to obtain (the next level of) promotion as campus managers or deputy principals because they are not seen as TVET curriculum specialists.

Eagly et al. (2003) note that double standards may produce highly skilled women, but that men tend to undermine them, whether through gatekeeping on appointment committee panels or subjecting them to intense scrutiny after they have been appointed (McNae & Vali, 2015). Priola (2007:21) explains that the 'maintenance of masculine practices is associated with downplaying women's achievements'. Women also act as gatekeepers themselves, protecting their own positions (McNae & Vali, 2015). Moreover, women's leadership behaviour is not evaluated equally with that of men and prejudice has a negative effect on promotion, a notion Van Zyl (2009:32) calls the 'PHD (pull-him/her-down) syndrome', with those women who attain higher positions being the victims of this syndrome. The over-manipulative (man or woman) transactional leader's compliance-based influence approach is in a way related to this so-called PHD syndrome. Kanungo and Mendonca (1996:73) explain:

> [T]he near destruction of the followers' self-esteem for the benefit of the leader makes the transactional influence process highly offensive to the dignity of people; therefore, it cannot be considered to be an ethical social influence process.

This ruining of an individual's self-belief leads to yet more barriers – self-doubt about leadership talents and a loss of ambition due to a lack of peer support and backing from seniors (Walker, 2013).

Eagly et al. (2003) believe that the gap between competent women leaders and the dearth of women leaders in top roles suggests that behaviour which fosters or impedes promotion should be scrutinised by researchers. Kent and Moss (2006) found a growing tendency to accept women as leaders and argue that challenges restricting women appear to be declining steadily. Conversely, the rest of the literature indicates that insufficient progress regarding gender transformation is being made in terms of gender stereotyping, subtle (man-to-woman and woman-to-woman) discrimination and other gender-related challenges. This lack of progress is disturbing and could be the reason why competent, potential women leaders in the TVET college sector surrender and/or even leave the sector. This study therefore needs to consider yet another facet of the conceptual framework, namely gender transformation initiatives, and also the development needs and support that women consider they require to advance their careers effectively.

Gender transformation strategies and initiatives for advancing women's careers

The clear proof of the under-representation of women leaders at TVET colleges in South Africa means that gender transformation and developmental support are needed for them to progress to senior positions. Through legislation, the government is key in introducing equality initiatives. These have been well timed for TVET colleges, as Dlamini (2013) states that progress made in the private sector is much slower. Yet, research shows that there are more ways – strategies and initiatives – to address transformation, which is the focus of the remainder of this section.

At the leadership level, both Tessens, Web and White (2011) and Dlamini (2013) identify ways through which to promote equity: the roles of government, the workplace (mentorship, leadership, and organisational culture, structure and policies), household support, society at large, and the woman's role in her own development. Walker (2013) adds self-belief, career planning and professional networks in order to inspire women on their career journey. As the government's gender transformation initiatives were described above, the focus now shifts to the role of the workplace.

First, Booysen (2001) solicits all-inclusiveness in equity initiatives, ultimately achieving an organisational culture that values diversity. Tessens et al. (2011) suggest a restructuring of working terms and workloads regardless of gender and raise the gendering of academics (only men receive support, resources or recognition) as a phenomenon to be eliminated. White (2003) recommends diversity management courses to boost the participation of senior women in higher education. Furthermore, developing individual women through mentoring (Doubell & Struwig, 2013), adapting the promotion process to eliminate apparent bias (White & Özkanlı, 2010), and specifying transparent advancement procedures (Agocs & Burr, 1996) may be additional ways in which to advance women's careers.

Secondly, household support is key in women's career progression (Tessens et al., 2011). This includes safety measures to reduce stress factors, such as the risk of being hijacked after late meetings (Suraj-Narayan, 2005). TVET college campuses in South Africa are often geographically far apart, and women leaders frequently have to return college vehicles to their respective campuses or the central office after dark. This has to be an untenable position for women, and one that should be reconsidered for its discriminatory nature. In addition, Hoyt (2010), Doubell and Struwig (2013), Hacifazlioğlu (2010) and White and Özkanlı (2010) stress the importance of sharing domestic and caregiving duties with spouses: for instance, children's lifts to and from school to reduce anxiety about home-related matters while at work.

Thirdly, Dlamini (2013) advises that society should be sensitised to gender transformation initiatives. Haque (2011) avers that equality may be realised if social transformation (via recognition, justice or redistribution) and women's full participation in the labour force (via no discrimination or violence against women and equal empowerment), underpinned by education and raising consciousness levels (via political parties, the media, non-governmental organisations (NGOs), the government, and family support), are all encouraged.

Fourthly, as qualifications may influence women's career progression, aspiring women leaders at TVET colleges should be encouraged to invest in postgraduate studies, as funding from government is not readily available for master's and doctoral degrees (Pande & Ford, 2011). In agreement with White (2003), Tessens et al. (2011) propose women-only programmes that focus on people management, political, personal or operational career development, and executive skills. Likewise, according to Walker (2013) and Vinnicombe and Singh (2003), high-achieving women mention self-belief and career planning as having influenced their careers positively. Georgopolos (2014) avers that multicultural capacity-building leadership courses for women may improve their self-belief.

Finally, Tessens et al. (2011) regard peer support and networking as being key to women's development. Pande and Ford (2011) and Lumby and Azaola (2014) agree, as networking connects leaders to influential members of organisations. Supportive professional networks provide a countermeasure to the male-dominated leadership cadre (Davidson, 1997; Marbley, Wong, Santos-Hatchett, Pratt & Jaddo, 2011). The women presidents of Harvard University, Brown University and the University of Pennsylvania in the United States advise women, as part of their career planning, to join influential committees, take risks, be self-assured and make their presence felt in meetings (Moltz, 2011).

The literature highlights ways of dealing with gender transformation that may enhance the progress of women leaders at TVET colleges to senior positions in the sector and prevent them from leaving prematurely. Yet, although it seems as if sufficient strategies are provided to deal with gender transformation to counteract gender discrimination, there is insufficient evidence to show that legislation has succeeded in equipping respondents with strategies to deal effectively with such discrimination.

In closing, defining gender, providing a gendered perspective on leadership, and discussing career pathways with all their challenges and initiatives to overcome these challenges have made it possible to produce a contextually sensitive framework and establish a point of departure against which future research in this area can be reflected.

Conclusion

Some progress has been made regarding gender equity, but gender stereotyping and subtle forms of discrimination still prevail in the TVET sector. From a study of the literature surveyed here, it was determined that there is certainly wide scope for developing a holistic conceptual framework that will support the range of gendered experiences of women leaders at TVET colleges. Matters of gender, power, educational leadership, micro-political positioning and individual life experiences make the story unpredictable and uneasy. All the varying and conflicting intersectionalities and unconventional behaviour of stakeholders complicate the reasoning behind what is at issue when women leaders decide to leave the sector prematurely or abandon top leadership positions. Adopting the holistic framework in the reported study and looking through a series of lenses will therefore deepen our understanding of the gendered

experiences of women in academic leadership as long as we acknowledge that each individual perspective – including those of the researcher and the reader – is necessarily imperfect. Through reflection, a fuller appreciation of the complexities and difficulties of transformation can be developed. Regarding the broader significance of this article, a great deal remains to be done; it should therefore serve as a point of departure in addressing all-inclusive gender transformation, to the advantage of both women and men in TVET college leadership positions.

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Adult learning, gender and mobility: Exploring Somali refugee mothers' literacy development and empowerment through engagement with their children's education

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ABSTRACT

In this article, I explore Somali refugee mothers' acts of becoming literate in order to support their children's educational success. The literature on parent support and involvement makes fleeting reference to the forces of globalisation; it also pays little attention to refugee parents as being agents of, or subject to, such forces. Research into education and development, as it relates to adult learners, focuses mainly on higher education, economics and labour market issues (Kenway & Kelly, 2000; Blackmore, 2014). The local–global dialectic of school–home relationships has a particular bearing on my research into the refugee parent experience. Accordingly, I reason that parents' engagement with their children's education is interwoven with their own histories of educational disruption, displacement and mobility. For this reason, I engage with their cultural and historical contexts as tangible influences on their present-day engagement with learning and education.

In this narrative enquiry, I researched the life experiences and beliefs about education of four refugee mothers, analysing their testimonies or 'narratives of political urgency' (Bernal, Burciaga & Carmona, 2017) in order to probe the intersectionality of gender, language, ethnicity and power. I investigated their personal empowerment and the community cultural wealth that the women accumulated on their journey to becoming literate.

KEYWORDS

adult learning; mobility; community cultural wealth; illiteracy

Introduction

Researchers in the sphere of education identify the home environment as a critical pedagogical context for shaping not only children's literacy skills and identities (Cameron & Gillen, 2013; Levy, Hall & Preece, 2018), but also their social and emotional development (Vandermaas-Peeler, Sassine, Price & Brilhart, 2011). The South African Schools Act (SASA) 84 of 1996 encourages parent–educator partnerships by authorising parents to share the responsibility for governing schools with educators (Singh, Mbokodi & Msila, 2004; Lemmer, 2007), and facilitating the extensive engagement of parents in the broader educational agenda (Epstein & Associates, 2001; Hoover-Dempsey, Walker, Jones & Reed, 2002; Daniels, 2017). In the past, education confined the parents' role in the education of their children to a support role. The SASA redefined the role of the parent as a collaborator of education who serves on school governing bodies and who has decision-making powers together with educators about the governance of their children's schools. The research on parent involvement and support reflects three clear foci: 'how' parents need to be involved in education; the quality of that involvement; and the centralisation of the parent–school relationships. What most of the research shows is that strategies for involvement are defined by individual schools (Epstein & Dauber, 1991; Epstein & Associates, 2001; Hoover-Dempsey et al., 2002; Jeynes, 2007) and that the theorising is informed by middle-class European–American cultural practices.

The acknowledgment of the parent's role as collaborator with the educator, and the home as an additional pedagogical space, heralds a welcome shift in the scholarly writing about parent support in the context of education. Since South Africa's first democratic elections in 1994, the country has become home to many refugees from East Africa who fled wars in their countries, and to immigrants who have seen a future for their families in the newly democratic South Africa. However, many of these adult refugees lack a formal basic education or speak world languages that differ from South Africa's. This situation renders these parents extremely vulnerable as educational collaborators. Most of the scholarly research and writing on parent–school collaborations seems to misrecognise the heterogeneous educational backgrounds of parents and the effect this has on collaborative efforts. This happens despite research which indicates that these parents have different ways of showing caring, ways that are often not recognised by schools (Delgado-Gaitan, 1992; López, 2001; Orellana, Monkman & MacGillivray, 2003). This happens because there is a lack of will to acknowledge that multi-ethnic educational backgrounds introduce challenges into the structure of the home as a pedagogical space. One such challenge is to the literacy status of parents. Teachers often take it for granted that their students come from homes where parents are functionally literate in the languages of the school that their children attend. Furthermore, educators assume that literacy development in the home context will mimic the vertical trajectory of literacy development in the school, that is, as a movement from immaturity and incompetence to maturity and competence (Engeström, 1996). While the potential exists for literate parents to be socially capable of interacting with their children and of bridging the gap between what the child already knows and does not know by helping the child to make the appropriate associations, an illiterate parent might face many challenges in trying to do so.

As an educator and a researcher, I experience the inclusion discourse as one that pays limited attention to ethnicity, culture and language as barriers to educational inclusion (Freeman, 2010; Bower & Griffin, 2011). South Africa's history of inequality and segregation in education makes it important for educators to be sensitised to learners' diversity, ethnicity, cultural background and educational experience (Walton, 2012). The multi-ethnic classroom requires teacher reflexivity about the cultural, ethnic and linguistic home barriers to learning. This is, however, not the case in reality: teachers seldom reflect on how the heterogeneity of their learners' family backgrounds influences the learner and their parents' engagement with local educational practices. My review of the literature has shown that the challenges which refugee parents face with education in general and with illiteracy in particular are largely under-researched themes in studies about parent support. My ongoing research on immigrant and refugee communities has shown that teachers possess very limited knowledge about the refugee learners' home backgrounds (Daniels, 2017; 2018b). Teachers' lack of insight into the sociohistorical lives of refugee parents prevents them from making the connection between parent illiteracy and their children's challenges with literacy development. Instead, teachers continue to subscribe to the dominant narrative of refugee and migrant parents as being uninvolved in, and uncaring about, their children's education.

International research on teachers' views on immigrant parent involvement indicates similar findings, reporting as it does on how teachers misrepresent parents when they speak about them (Lareau, 2000; Lareau & Weininger, 2003; Waterman, 2008; Li, 2010). These studies found that teachers were more likely to attribute the educational problems that students of minority groups experience to parents who are uninvolved and homes that lack cultural capital (Harris, 1985, cited in Lareau, 2000). Given these findings, a different reading of the involvement of illiterate parents in the education of their schoolchildren, and the beneficiaries of their exchanges, is required.

Situating the problem

Since South Africa became a constitutional democracy in 1994, many Somali refugee families have made this country their home, despite their lack of a common linguistic, cultural and ethnic history with South Africans. When the Somali civil war started in 1991, the country's education system collapsed, and, with that, Somali children's right to a basic formal education was undermined. Families from established communities were uprooted and the children of such families spent their childhood leading nomadic lives fleeing warlords, with most eventually seeking shelter in refugee camps. Three decades later, these displaced children are adults who are raising their own children in foreign countries such as South Africa. These parents, however, do not have the educational background or the formal school competencies that South African education requires in order to support their primary-school children's literacy development in the ways that schools value. International and national research shows that parents' illiteracy in their children's language of learning poses the biggest threat to the parents' role as educational collaborators (Singh et al., 2004; Martinez, 2011; Daniels, 2017; Slinger-Steenberg, 2018).

The refugee parent's literacy should be an important theme for educational researchers of the South African classroom to explore, given the country's growing refugee community and the challenge that multi-linguistic school populations pose to children's educational success. Research that explores the ways in which illiterate parents involve themselves in their children's schooling could inform educators about how best to support such initiatives educationally. It could also lead to a different type of collaboration with parents. In this article, I explore the challenges that illiterate parents face when they become involved in helping their children with their homework, and I discuss the benefits they derive from being involved in their children's education. The research question that guided the discussion is this: 'How do illiterate parents engage in educational processes, and what personal learning benefits do they derive from the experience?'

As there are relatively few studies that focus on refugee mothers' involvement in their children's education, and none in South Africa that explore refugee mothers' acts of adult learning and personal empowerment, my research aim is to amplify 'the roar which lies on the other side of silence' (Belenky, Clinchy, Goldberger & Tarule, 1986:4). The feminist cultural theorist, Macedo (2015:83), asks us to ponder the 'disquieting narrative about the erasure of identity and silence' regarding women's educational experiences and contributions. This I sought to do by subjecting the women's educational contributions and investments to the public gaze in an effort to make visible their roles and to acknowledge them. I followed a humanist and equity-oriented research agenda, as it is my contention that refugee women's mobility differs from that of men, and, therefore, that their challenges are different too. Through narrative enquiry, I engaged with four refugee parents one-on-one and had the opportunity to probe aspects of their lives that informed my understanding of their educational trajectory (Creswell, 2003; Mertens, 2014). The data formed part of a bigger research project[1] on parent support in an immigrant Somali community of refugees.

The four refugee mothers – Amirah, Malaika, Afifa and Shakira[2] – talked about their own histories with formal schooling and the social and historical influences that war had exerted on their educational development. I then explored the strategies they devised to participate in their children's schooling. Finally, I asked them to share the benefits that they had gained through participation. My presentation of their stories is an attempt to trouble the politics of misrepresentation and to challenge the parody of the refugee parent as being uninvolved in their children's education.

1 Acknowledgement: I wish to thank the National Research Foundation for their funding of my project through their Competitive Programme for Rated Researchers grant.

2 Pseudonyms were used for the participants in order to protect their identity.

Theoretical framework

Literacy is a socially and culturally situated practice that is rooted in cultural, historical and institutional contexts (Lankshear & Knobel, 2006). I draw on Gutiérrez's (2008) sociocritical literacy construct to historicise the literacy practices in the refugee home contexts of Amirah, Malaika, Afifa and Shakira. This allows me to reframe the zone of proximal development as a collaboratively constituted zone that facilitates the empowerment of both linguistically marginalised refugee parents and their Foundation Phase children. I consider literacy as 'more than a collection of decontextualized skills' (Alley, 2018) and share Gutiérrez and Larson's (2007) concerns about how horizontal forms of expertise that develop within and across the home practices are under-researched and not reported on. For her research in diverse ethnic and cultural contexts, Gutiérrez (2002) coins the term 'sociocritical literacy' in order to emphasise the complexities present in the transnational and hybrid world of the refugees' and displaced learners' home contexts. According to Marr (2017), itinerant methodologies can bring cross-spatial interconnectedness, also referred to as 'translocality', within critical range. Their use of such nomadic methodologies can, in turn, raise the consciousness of researchers about the energetic currents present in the transnational community (Marr, 2017).

My construct of the home as a pedagogical space builds on an existing body of research that views it as a particular kind of zone of proximal development[3] (Lave & Wenger, 1991; Engeström, 1996). The perspective adopted here brings under scrutiny both the traditional roles ascribed to parents in the zone of proximal development and the beneficiary of learning. I perceive cognitive development in the home where both parent and child have limited literacy competencies to be collaborative and bidirectional. I find support from Auerbach (1995), who challenged the view of literacy learning being a one-way process from parent to child and argued instead that literacy interactions between parent and child often become a two-way system in immigrant families (Packard, 2001). However, it is an interactional space in which the illiterate parent still has to mediate the literacy development of her child, despite the limited range of tools at her disposal. I find it useful to engage with the parent–child collaboration as a community of practice (Lave & Wenger, 1991) in which both parent and child engage in collective learning and both experience learning benefits. This situation then opens up a space for family literacy, which is an intergenerational approach to literacy acquisition. The term 'family literacy' refers mainly to programmes or a curriculum through which parents are taught ways in which to prepare their Foundation Phase children for education. I use the term to refer to informal literacy practices that children and parents perform together, such as reading and writing, to advance their literacy.

3 The zone of proximal development is best understood as the zone of the closest, most immediate psychological development of the children that includes a wide range of their emotional, cognitive and volitional psychological processes. Simply put, it is the difference between what a learner can do without help and what they cannot do without a teacher's assistance.

The analytical tools that I used to understand the participants' navigation of education as illiterate refugee women are informed by Bourdieu's concepts of field, habitus and capital and by Yosso's (2005) community cultural wealth theory.

Bourdieu's concept of field (Bourdieu & Wacquant, 1992:97) refers to 'a network of objective historical relations between positions'. The 'field' explored in this article is the combined educational landscape that the parents traversed with their Foundation Phase children. The field is, however, a dynamic space in which there is constant vying for prime positioning and power. Moreover, the parent and the child have a relationship with the outcome of the action; the actions they take therefore facilitate a particular outcome. To explain the repeated patterns of such daily actions, Bourdieu (1998) introduced the term 'habitus', which refers to an individual's internalised ways of doing and being.

Bourdieu (1998:11) further describes a 'field' as a social space, that is, 'an invisible reality that cannot be shown but which organizes agents' practice and representations'. One's tacit understanding of the field brings one to understand social practices and how these practices are being facilitated. According to Fataar (2008), it is through studying the social spaces (fields) which people occupy that one develops an understanding of what people become when they inhabit these spaces, as well as how individuals use social spaces and what they produce out of such spaces. Importantly, it gives one insight into what people identify as the resources or the capital that they use to navigate their worlds successfully. 'Field' is useful in advancing insight into the resources that were available in the social spaces that the four mothers in this study navigated as children growing up in difficult circumstances, and the types of capital that they acquired in order to facilitate their children's basic education. By analysing the sociohistorical spaces they occupied, one can reveal how advantage and disadvantage played out in their lives, and how this influenced their decisions and their stance on education later in life.

For my research among vulnerable illiterate adults, I found the community cultural wealth (CCW) theory of Yosso (2005) to be a more suitable framework for analysing the women's narratives. This framework acknowledges the mutual engagement and influences between individuals and the communities they grew up in. Yosso's CCW theory both extends Bourdieu's perspective of cultural and social capital and provides a different reading of it (Daniels, 2018b). Bourdieu's theory centres on the middle class; therefore, the capital that working-class communities produce in their struggles 'to survive and resist macro and micro forms of oppression' (Yosso, 2005:77) are not explained. For Yosso (2005:77), the cultural wealth that exists in working-class communities is represented by 'an array of knowledge, skills, abilities and contacts' that they possess and use to survive under often harsh circumstances. Yosso (2005) states that marginalised communities nurture cultural wealth through six forms of capital that she characterises as aspirational, navigational, social, linguistic, familial and resistant capital. These forms of capital become dynamic interrelated practices that build on one another. Therefore, cultural and social capital are resources that are constantly being renegotiated, adjusted and produced as individuals move between real and virtual spaces on their life journeys.

Sociohistorical context of Somali refugee mobility

Globalisation has led to the increased movement of peoples and has made an extended range of mobilities possible. However, as pointed out by Cresswell (2010:17), various aspects of mobility make it 'powerfully political'. Bauman's (1998) earlier research into mobility suggested that it should be studied alongside social stratification and exclusionary practices because of society's propensity to 'other' and to label certain members of society as 'not belonging' as a form of stratification that leads to religious, gendered and racialised hierarchies. A contemporary example of this is Donald Trump's ruling at the beginning of his presidency that migrants from predominantly Middle Eastern countries and followers of Islam would temporarily be denied entry to his country because they are 'inadmissible aliens' and 'would-be terrorists' who are 'detrimental to the interests of the United States'.[4] I argue that it is such hierarchies that later inhibit the physical movements and status-related actions of profiled subgroups such as refugees.

Earlier accounts of mobility studies considered movement, integration and transport as forms of mobility. Sathar and Kazi (2000) (see, also, Besteman, 2016) point out that female mobility and honour are closely linked, because, in some patriarchal communities, women's mobility carries the risk of dishonour as the traveller goes through public spaces. In this gendered theme, the distinction is made between socially acceptable mobility such as subsistence travelling – for example, for work purposes – and mobility for discretionary activities, which is less acceptable (Mumtaz & Salway, 2005; Adeel, Yeh & Zhang, 2014). The 'new' mobility paradigm departs from this framework and instead seeks to integrate the various forms of movement across disciplinary boundaries in an attempt to advance a more holistic understanding of mobility. I use Cresswell's (2010:20) definition of mobility as 'the entanglement of movement, representation and practice' to understand the refugee parents' trajectories from war-torn Somalia to South Africa.

Somali migration and displacement of the past quarter century is described by Marr (2017) as 'a compulsory migration into stateless or emotional homelessness'. Siad Barre's government was overthrown in 1991, causing total anarchy to erupt as warlords from the various clans fought one another for power. The devastating consequences of war together with drought, famine and violence forced the mass displacement of Somali society into refugee camps in Kenya, Ethiopia and Yemen. The majority of Somali families fled to the Lagdera District, where the Kenyan government, with the assistance of the United Nations High Commission for Refugees (UNHCR), set up the Dadaab camps of Ifo, Dagahaley and Hagadera in 1991 and 1992 to respond to the crisis (UNHCR, 2018). In 2017, the UNHCR put the total population of Somali refugees in Kenya at 308 700, of which 244 000 were still living in the Dadaab camps. The UNHCR, in its global focus annual report (2018), estimated the number of people who were internally displaced in Somalia to be 2 648 000 million, of which 122 646 were returnees, 16 031 asylum-seekers and 16 230 refugees.

4 US Code §1182, cited in Executive Orders 13769 and 13780: 'Protecting the Nation from Foreign Terrorist Entry into the United States' (27 January and 6 March 2017).

The mobility patterns for refugees are different from those for migrants in that refugees are displaced people who have been forcefully uprooted and displaced (Bekkers, 2017). Their mobility is also more likely to be tied to dangerous events and traumatic experiences. There are many incidents that the four women recount about their flight to safer areas being traumatic experiences in which the lives of close family members were lost. The narratives of Amirah, Malaika, Afifa and Shakira delineated disrupted childhoods, displaced families, and memories of family members – all males – killed by rival clans. When Amirah's family fled their village, she was 11 years old. Amirah was part of a group of 13 family members who overnight became homeless nomads. She recalled how, for five years, their group led a nomadic lifestyle, fleeing from village to village and from country to country, defending themselves against warlords and hiding to escape death:

> They were killing the kids … they were raping the girls (pause) … I can tell. We ran from village to village, from country to country. I was 11 and kept running until I was 16. They killed my father. They kill[ed] my uncles. (AM interview, 2016)

Malaika's experience is similar to Amirah's. She, too, was 11 years old when she arrived, on her own, at one of the Kenyan refugee camps. In the chaos that ensued when their village came under attack, Malaika was separated from her family. After spending one year without her family members in the Dadaab refugee camp on the Somali border, Malaika was fortunate to be reunited with her mother in another refugee camp. For both Malaika and Amirah, the trauma of war and displacement, death and loss is part of their childhood memories. The Dadaab refugee camps became their homes and their places of safety where they grew into adulthood. Malaika met and married her husband in the refugee camp.

Afifa and Shakira, the other two women whose stories I tell, were toddlers when the war started. Owing to the lawlessness in their country, even they as young adults eventually sought refuge in the refugee camps. Shakira was a 15-year-old widow when she arrived at the Dadaab refugee camp with her baby daughter after her husband had died at the hands of Somali warlords. She would spend eight years in the camp, where she met her second husband and remarried.

Starting over: Dreaming of a future

In my analysis of what their goals, hopes and dreams were of a future, a common narrative emerged for the four women. While in the refugee camps, they all dreamt of resettling and migrating to states where they could be safe, feel settled and live better lives. South Africa's camp-free policy was an attractive option for the young married couples, as it presented them with better physical-mobility choices and economic prospects than they had enjoyed in Kenya, and even in Europe. According to the women, South Africa's new democracy under Nelson Mandela's government from 1994 made many young Somali adults in the Dadaab camps turn their gaze to the south. South Africa is a signatory to the United Nations Refugee Convention (UNHCR, 1997) and has to grant access to work to all successful applicants with refugee status. Moreover, the country pledged that refugees' children would have access to basic formal education.

In 1997, Malaika, Amirah and their spouses, together with five other adults, left their Kenyan refugee camp and relocated to South Africa. They had to cross back into the country of their birth, from where they travelled south to Kismayo, a port city in Somalia. There they boarded a boat and travelled to Mozambique. Because they were illegal migrants in Mozambique, they remained in hiding until they could finalise their travel to South Africa. In Mozambique, illegal migrants make use of local agents who, for payment, are willing to transport them overland to the South African border. When the group arrived in South Africa in 1997, they applied for and were granted refugee status. The nine adults chose South Haven,[5] a former Coloured township about 50 kilometres from Cape Town, as their home. Since 1997, when the initial nine adults settled in the community, the Somali community has grown to about 100 families.

Shakira arrived in South Africa a decade later and Afifa four years after her.

Table 1 provides biographical information about each participant.

Table 1: Demographic information on the participants

Parent	Age	Arrival in South Africa	Marital status	Formal education	Children	Work
Afifa	33	2002	M	None	8	Homemaker
Shakira	34	2006	M/2nd	None	4	Manages a fruit-and-vegetable shop
Amirah	39	1997	M	4 years	10	Runs a business together with her husband
Malaika	39	1997	M	None	8	Runs a business from home

The first waves of newly arrived Somali refugees were mostly single men who settled throughout South Africa in black communities and townships. This migration pattern changed in the next decade, when the Somali refugee families would chain-migrate to communities where an existing Islamic habitus was in place. Since the 2000s, the Western Cape, with its visible Muslim presence, seems to have been a preferred province for Somalis to settle in (Jinnah, 2010; Daniels, 2018b). South Haven, where the research population is settled, has an established Muslim community and its infrastructure includes five mosques, a community primary school and a high school, a habitus that is ideal for this staunchly religious refugee community.

5 This is a fictitious name for the town.

In my interviews, I explored their sense of belonging to, and membership of, the established community. Although their preference was to settle in communities where there is a visible Muslim presence, they were not eager to assimilate into the community. Instead, their decisions seem to be rooted in being in a Muslim community where an Islamic ethos is present and they have access to the community's scarce religious resources and infrastructure. Their actions suggest segmented assimilation and dissident acculturation to the South African Muslim community. For example, even though they were attending prayers in the community mosques and were sending their children to the only Muslim school in the community, they were resistant to, or hesitant about, integrating into the community. I interpret this resistance to assimilate as being part of an understanding of the transnational condition of being fearful of losing their cultural and national mode of being. In my conversations with the four women, I found them to be very proud of their heritage. The Somali identity is evident in their uniform style of dressing: long skirts and burka head coverings.[6] They were very critical of the manner in which South African Muslims practise their religion and disapproving of the Western dress code of South African Muslim women.

Dreams and aspirations of literacy

In this section, I discuss the women's aspirations and the steps they took to realise such aspirations. They described the world that they are living in today as vastly different from the one they left behind in the Kenyan refugee camps. In the refugee camps, they had no opportunity to gain an education. The Universal Declaration of Human Rights (UN, 1948) and the Convention against Discrimination in Education (UNESCO, 1960) affirm education as a human right. However, life in the refugee camps initially was about survival and about providing refuge to the thousands of displaced people who arrived daily at the camps. According to the participants, no formal basic education was made available to children in these camps. As a result, Shakira, Afifa and Amirah never went to school and Malaika did not continue her schooling beyond Grade 4.

For these adults, access to education for their children seemed to be the major driver for choosing South Africa as their home. Malaika, the only one who had experience of formal schooling, described South Africa as a free, safe country where refugee families can enjoy equal opportunities with South Africans. This 39-year-old mother has raised eight children in the 20 years that she has been living in South Africa. All her children had the opportunity to go to school, and her eldest son is now a university student who is studying towards a degree in psychology. This is also the case with the other participants, with all their school-age children being enrolled at school.

A theme that runs through their narratives is how these women accumulate aspirational capital and use it to encourage their children to accomplish academically. An example that Amirah provided of this is that she and her spouse continuously share their refugee experience with

6 Headgear worn by women to cover their hair and upper body.

their ten children. They constantly tell their children about the hardships they endured in the refugee camps and how they persevered and migrated to South Africa to start a new life. Amirah was unwavering in her resolve that her children would complete their schooling and have professions. What was interesting to me was the extent to which she had invested in each of her children's plans for the future. She could name each child's professional aspirations and invested in books on each profession that her children showed an interest in. She said:

> Even now, until they finish matric, when they go to college, university … we want to be ready. Whatever it takes, we will be ready. Whatever they dream, what they want to be – we will support them. (AM interview, 2016)

Malaika's narrative validates that of Amirah's. She, too, is ambitious for her children, and reminded me that she is emulating her mother, who taught her to read and to value education.

Access, mobility and learning a new language

In the conservative Somalia of the 1990s, girls traditionally did not receive a secular education, only a religious one. However, all the women grew up in families and communities where every child had equal access to formal basic education. Afifa, Malaika and Shakira recall both boys and girls from their communities going to school prior to 1991. However, their communities prioritised religious over secular education, and parents preferred their children to receive a religious education first, and then start their secular education. The annual visit by Amirah's aunt who was working in Italy led to a break with tradition for the girls in her family. Her aunt told of how her lack of a formal education had handicapped her navigation in a learning society, and of her social and economic challenges in advancing in society. She convinced her brother, Amirah's father, that formal basic education is an investment in a better future for his daughters. Amirah was seven years old when she enrolled in Grade 1 and was in Grade 5 when the war started. Malaika, who is the same age as Amirah, enrolled at a Madrassa (Islamic school) first. Therefore, when she graduated from the Madrassa at age 11, and was about to start with her secular education, the country was a war zone; all the schools had stopped functioning and the education system collapsed. However, what my findings show is that these women's childhood home contexts were pedagogical spaces where learning was encouraged.

They all recalled growing up in homes where various forms of cultural and social capital, such as books and newspapers, were present and informal education systems were in place. In Afifa and Malaika's homes, they were exposed daily to the customary reading, by adults, from the Quran. The older family members were all literate in Arabic, as they had completed their Madrassa education and practised a daily reading of the holy book. Afifa and Malaika's mothers had been to school and were literate in Somali. Malaika's prized possession is a bilingual Somali–English dictionary that she saved from her childhood home and brought with her to South Africa. Malaika, Afifa, Amirah and Shakira all had access to religious education, which continued even in the refugee camps. Therefore, despite their lack of a formal education, all of

them had accumulated various forms of cultural capital, mechanisms that guided their own decisions and actions concerning education in later years.

Their initial decisions were influenced, however, by the sociocultural context in which they initially found themselves as Somali refugees. They recalled how, when they first settled in South Haven, the patriarchal values that shaped their social practices and influenced their mobility as girls in Somalia were re-established. It was these values that became deterrents to their literacy development in South Africa. Their closed Somali community expected them to identify with the gender-defined role of homemaker and to abide by cultural norms that discouraged mixing with outsiders. By socialising only with women from their own ethnic group, in their own language, they had no incentive to learn the host country's languages. As Porter (2011:65) observed, women's immobility

> relates not only to male concerns around the vulnerability of girls to sexual and other attacks and to their potential promiscuity, but also to gender divisions of labour, which typically place great emphasis on female labour contributions to household reproduction and, in locations where the transport gap is substantial, assign pedestrian transport of goods to females.

The men worked outside the community, which made mobility part of their daily experience. The men's work as informal traders in neighbouring communities created opportunities for them to mix and interact with the broader South African community and to develop literacy skills in the South African languages.

Even when the women were raising their pre-school children, they still did not experience their lack of English literacy skills as a barrier to communication because they seldom socialised outside of their ethnic group. It was only once their children started primary school that these mothers realised that their children lacked the foundational preparation for literacy. No foundational model for literacy was in place in their home environments; moreover, the practices of shared reading and reading aloud and the availability of print materials in English to promote positive attitudes to literacy were not in place. The lack of a shared language with the school placed them in situations where they were unable to communicate with their children's teachers, or even with their own children, about their schoolwork. The four mothers said that their inability to contribute to their children's development left them feeling incompetent, marginalised and alienated.

At the Foundation Phase level, teachers expect parents to be active participants with their children in homework activities. However, because the mothers were illiterate, they did not have the operational skills to execute the sanctioned school-related activities. Furthermore, they lacked the oral English literacy skills to function as facilitators of their children's home educational practices. Even so, the women displayed a strong commitment to their children's education despite the dispositional challenges that emanated from a lack of formal schooling. All of them said that they had started a journey towards becoming literate, starting with the English language.

When I interviewed the women in 2016, all of them were literate in English. This was, however, not the situation for Somali refugee women two decades earlier. Amirah was the only one who already knew a few English phrases when she arrived in South Africa. The other three participants said that they first heard English being spoken while watching television in the Kenyan refugee camps. This dilemma of being confronted with the challenge of mastering the English language forced the parents to become proactive in order to improve their own linguistic competencies in English. I next present the various strategies that they followed to facilitate literacy.

Television as teacher

Television in general and the soap operas in particular proved to be the best language teacher for the four women. In the mornings, when their children were at school, they would watch reruns of American and South African soap operas, practising the pronunciations and mimicking the actors' actions. Malaika and Afifa succeeded in building an extensive vocabulary and conversational competency through this practice. They say they started with learning the salutations, which they then tested on their Foundation Phase children when they arrived home from school. According to Bernstein (2000), educational attainment augments pedagogical time at home. However, the beneficiaries are usually the school-going children, not the parents. The women say that their children became their biggest mentors as they learnt alongside them. One of the creative ways in which Amirah practised alongside her children was through visual documents. She would assign them the role of newscaster or reporter on television and record them on video while they reported on what they had learnt during their school day. Each night, she gave a different child the opportunity to report, on camera, on what had happened to them during that particular day. Afterwards, she would play back the recordings for the whole family to critique. This is an example of the collaboration that took place between parent and Foundation Phase child. It underscores the intergenerational benefits of family literacy – in this case the parent and child practising their communicative skills together.

Role of literacy in homework supervision

Supervising their children's homework opened up an educational opportunity for the mothers to learn alongside their children. The narratives of the parents contained many examples of what Bourdieu (1998) describes as the social construction of the strategies that the parents adopt in order to help their children and advance their progress in school. What I found was that these literacy interactions between parent and child were seldom one-way processes; rather, they often became two-way processes in which parent and child were both benefactor and beneficiary. Existing family literacy research with immigrant families (Auerbach, 1995; Packard, 2001) validates this finding. These interactions between parent and child created opportunities for building the cultural capital that schools value, such as reading aloud, comprehension, and parents buying books and modelling educational values by doing homework and practising reading.

The school propagates early childhood literacy as the key to future success; it therefore expects all parents to help their children with their Foundation Phase reading exercises. But these

parents spoke about their educational limitations when assisting their school-going children with comprehension exercises, written work and educational projects. Nevertheless, they succeeded in creating dialogical spaces in which school-related activities were possible. Although, in the beginning, they did not have the required level of literacy, they would imitate the supervision processes of committed literate parents. And, although the four women now have different literacy competencies, which they acquired during their residency in South Africa, all of them said that, initially, they struggled to support their children's cognitive development because of their illiteracy in English. Despite Afifa and Shakira's non-existent reading and writing skills and their limited oral literacy skills in English, they still went through the motions of engaging their children in reading activities, asking questions about the reading, and praising them for how well they were doing. At that time, however, these two mothers could not verify whether their children were reading correctly.

A successful strategy was to collaborate with their Foundation Phase children in dialogical reading (Huebner & Meltzoff, 2005). They exploited the fact that most Foundation Phase books are picture storybooks which allow one to grasp the gist of a story. A common strategy they followed was to allow the child to direct and lead the conversation about the pictures in the storybook. The mother would follow the child's dialogue, constantly posing 'what' questions that she linked to the pictures and rephrasing the child's responses. In this way, the mothers could gain literacy skills alongside their Foundation Phase children. I considered Afifa's use of the cellphone as an educational tool highly strategic: when she received text messages which she could not read, she would include them as reading activities and ask her child to read them aloud to her. This is one example of the dialogical exchange having a mutually beneficial outcome for both parent and child: the parent could access her messages and her child could practise reading.

The literate Amirah and semi-literate Malaika faced fewer constraints than Afifa and Shakira. The former two mothers told of how much time they invested in understanding instructions in order to do primary-school homework. Malaika's constant consultation of her bilingual Somali–English dictionary to make sense of homework problems has paid dividends, in that she is now skilled enough to supervise her primary-school children's homework.

During homework time, these parents had mechanisms in place that benefitted the educational project. In Amirah's home, her school-going children gather at 17:30 in a room which has a table that seats six. While they do homework or reading, she sits close by, supervising them. During the week, she does not allow her children to watch television or to enjoy playtime, as they attend both secular and religious school daily. The mothers believed that, by becoming involved in their children's schoolwork and by praising their youngsters for engaging in educational work, they were encouraging them to persevere. It is through such actions that the strong message that education is important was conveyed to their children. Furthermore, these actions by the then functionally illiterate mothers challenged the perception that, when children hand in incomplete homework at school, provide incorrect answers to teachers' questions, or submit poorly done projects, their parents were not involved in their homework. The data that

this study collected highlight the interest level of these parents and the investment that they made, but they also bear witness to the constraints that illiteracy places on the effectiveness of parent–child engagement.

Older children as literacy resources

At the time of the study, Malaika and Amirah had been living in South Africa for more than 20 years. In the earlier years, when their eldest children started school, these mothers, like Shakira and Afifa, were not yet functionally literate. This forced them to look to others in the community and in their extended family circle who were literate in English for help. In the extended Somali families, there were a few older male siblings and uncles who, while living and working in Kenya, had become literate in English. Malaika and Amirah also enquired at the school about people who could assist them. So, for example, Amirah used to employ a retired teacher from the local community to supervise her children's homework when neither she nor her husband had the skills or the knowledge to help them.

Now, however, Malaika and Amirah's older children are in high school and they have since become rich resources that the parents use to advance the education of their younger primary-school siblings. My analysis of their narratives also indicates that there are constant exchanges of resources within and between the families. In the two decades which have passed, they have established support networks that such parents can access. An example of this is older high school learners offering their educational services to parents such as Shakira and Afifa in return for a small fee. Afifa also makes use of an after-school programme that provides extra tutoring in languages and mathematics, the learning areas that her children need help with. These examples reveal that there are parents who are proactive about addressing the literacy challenges they have. They explore ways of circumventing their limited capabilities by accessing support networks. At some stage, all of them had to locate valued resources in their own and the local community to assist them with educational support and help them successfully navigate their educational challenges. This is what Yosso's (2005) community cultural theory categorises as social and navigational capital, and what Bourdieu (1998) refers to as social capital.

Education beyond schoolwork

Besides the pedagogical support, there were other forms of support that the parents provided which indirectly enhanced their children's pedagogical development at school. I found Bourdieu's (1998) 'field' a useful tool to use in my analysis of the resources that were accumulated in the social spaces of the families' homes and the types of capital that they acquired to facilitate their children's basic education. The mothers' actions and investments in education were part of their daily engagement with their families. I argue, however, that they could not have been successful as champions of education if they had not also equipped themselves with literacy skills. What my analysis of the data shows is that the investment in education that these parents make in their children extends beyond schoolwork. For instance, one of the creative ways in which Amirah informally created a pedagogical space at home and

advanced a learning culture was by documenting their deeds visually. Instead of just asking her children to tell her about their school day, she devised a game that imitated television news reading and video-recorded the activity. Furthermore, she had a permanent arrangement with her primary-school children to accompany them to the local library on a Friday. What Amirah's intergenerational activities did was to build capacity and strengthen cognitive skills, acts that empower learners, both adults and children, to access and participate effectively in a learning society.

Discussion

Often, it is assumed that illiterate parents have no history of literacy and therefore are not as involved in their children's education as literate parents are, and that they do not value education. Furthermore, educators engage with school and home contexts as if they were organised in pedagogically similar ways. The data I collected on the refugee parents' involvement in their children's education shows such assumptions to be false. Amirah, Malaika, Afifa and Shakira invested heavily in their children's education once they had identified the barriers to their involvement. One such barrier was their immobility as Somali refugee women and the negative effect that had on their ability to access resources and services. As newly settled refugee women, their cultural practices isolated them by restricting their engagement with people from their own ethnic group. This practice proved to be detrimental to their acculturation to South African society and limited their accumulation of the cultural and social capital that they needed to support their children's early literacy development. The expectations of schools that parents of Foundation Phase learners collaborate with the teacher and step in as home literacy teacher created a major predicament for these illiterate parents. The parents identified their illiteracy in English as the barrier to their own children's successful navigation of formal education. They therefore started understanding the importance of organising their homes as pedagogical spaces if they were to affect their children's cognitive development and collaborate with their children's teachers. They also realised that the practices and representations of the home as social space, or field, as Bourdieu (1998) referred to it, had to change, or shift, if the homes were to become literacy-rich environments in which their school-going children's cognitive development could flourish. The findings show that these women made an extraordinary effort and devised creative ways to advance their children's development, which confirms that each of these women exercised agency.

Although the four mothers were not part of a formalised intergenerational literacy programme, they were cognisant of the importance of reading as far as early childhood literacy development is concerned. Even when they were not yet literate in English, they engaged their Foundation Phase children in activities such as having them read aloud and supervising their reading practice. By positioning themselves as co-learners with their children, the mothers had access to the planned and systematic instructional events that their children brought home as homework. What the data show is that an intergenerational literacy context was developing that allowed them to learn alongside their children. The mothers would simultaneously work on strengthening their own functional literacy skills in English by watching television soap operas and creating

opportunities to practise their English with their older children. All of these practices and activities became cultural capital that the parents and children were first accumulating and then spending to benefit the family literacy process. This, in turn, empowered parents with the confidence to engage in functional literacy practices such as visiting the school, meeting with teachers to discuss their children's progress, attending parent–teacher meetings and volunteering for after-school activities.

While working through the data, I reflected on how far the women had come from being illiterate refugee parents who had wanted better futures for their families. Their literate state seems to have benefitted the women in various ways. In the interviews, they came across as confident women and they spoke English fluently. In the ten years that Afifa and Shakira had been living in South Africa, and Malaika and Amirah's more than 20 years in the country, there have been major changes in how they navigate their worlds. What struck me was how freely they were moving around in the community. On the days of the interviews, two of the mothers first had appointments at the school before meeting with me. All of them walked to the school and the venue unaccompanied. Their mobility in the community seemed unrestricted, as the women use public transport to get to the town's business district and workplaces. Being literate seemed to have given the women increased mobility, as they could navigate their community unaided.

In addition to being the primary homemakers and caregivers in their families, three of the four women worked outside the home, as traders. Shakira owns and manages a fruit-and-vegetable shop, Amirah is in business with her husband, running a grocery-cum-cell phone shop, and Malaika has a home store where she serves as a distributor of traditional foods and pulses from East Africa. Their free movement between private and public spaces and their engagement with the broader community as traders differ radically from the context they described when they first arrived, having been confined to home and mixing only with women from their own ethnic group.

The women's past educational experiences influenced their present educational trajectory and that of the dreams and aspirations they have for their children's future. The overriding motivating factor for sending their children to school was to secure a better quality of life than the one they had left behind in the refugee camps. The social and historical contexts that had defined their early childhood experiences with education were also influential in defining their decisions in adult life. The mothers came from communities that had traditions of literacy and had grown up in homes where they were exposed to informal educational systems. Their parents and older family members were all literate in Arabic and Somali, as they had completed their Madrassa education. They were familiar with oral literacy traditions, such as reciting and reading aloud, and their memories of the presence of various forms of written artefact in their homes served as evidence of the value of literacy. It is their knowledge of the value of cultural and social capital that inspired these mothers to establish home environments in which education is valued and to engage in acts that encourage educational development. My finding that Amirah, Malaika, Afifa and Shakira all present with an embodied form of capital, as reflected in their attitudes to

education, is supported by my knowledge of their childhood social contexts. Their experiences of both informal and non-formal education positioned them favourably towards formal education and spurred them on to invest in their own and their children's education.

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What's in it for me? Barriers to participation in adult learning in small communities of western Canada

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ABSTRACT

This article examines educators' and policymakers' efforts at addressing barriers and supporting adult students' access to, and success in, small communities in western Canada. Research indicates that, despite the provision of financial support and flexible and varied delivery modes, and a focus on meeting learner needs, adult learner participation rates in Canada are currently lower than those in other countries. Government policies and programmes are aimed at employability: they currently focus on trade and vocational training programmes that meet the needs of the job market. This single-minded approach of funding programmes that meet economic needs promotes the ideal that the primary purpose of education is the financial gain that comes from securing employment, or better employment, as a result of one's studies – this as opposed to recognising the role adult education can play in fostering social justice. What is argued here is that, in order to increase participation in adult education, one does not necessarily need greater resources but rather a shift in cultural values – a shift from valuing education solely as a means to employment towards valuing it as a means of individual and community development. Greater numbers of people must see the value of adult learning and recognise the ways that it can contribute to equity and social justice in their lives and communities. This article calls for research that will delve deeply into the barriers to participation in adult education in the wider context of our society. I hope that Canadian students, educators and policymakers will create room for social justice and equity alongside their employment-focused approach to adult learning, and that nations with an emerging discourse will revisit the implications of considering adult education as being solely aimed at employability.

KEYWORDS

adult education; training; barriers; participation; social justice

Introduction

In the first chapter of my career in adult education, I taught English-language classes to newcomers to Canada. When newcomers were asked why they were studying, the answers varied, but always referred in some way to improving their new life in their new country. The learning they sought – English-language skills – would allow them to develop relationships with their new neighbours, speak to their children's teachers, improve their employment situations and participate in civic life. These responses relate to the role of adult education in 'developing their capacity to participate more fully and critically in society' (Connolly, 2016:88).

Adult education's role in fostering equality and social justice is not as clear in the second chapter of my career, where I teach in the area of academic upgrading. Most of the learners are mature Canadian-born students. In contrast to my first demographic of learners, adult students requiring academic upgrading invariably respond to the question why they are studying with a response that relates to improving their employment situation rather than to living a better life. This focus on employability is held not only by students and prospective students, but also by society at large, including teachers, educational institutions and governments; and it represents a shift from a focus on social needs to the needs of the labour market. This single-minded approach to adult education fails to recognise that learning can be valued for its role in an individual's development as a person and a citizen. Adult education also has the potential to foster social justice and equity in society, but may result in fewer Canadian adults' engaging in learning opportunities. One might argue, therefore, that a cultural shift in values would be needed to increase participation rates significantly and, in so doing, create opportunities for adult education to play a significant role in social justice and equity in Canadian communities.

The context

The two most westerly provinces in Canada, Alberta and British Columbia (BC), are resource-rich, with a large oil and gas industry in Alberta and a large forestry industry in British Columbia. According to demographic information published by the Government of British Columbia (2017a) and the Alberta Government (2017), they have a combined population of approximately nine million people, of whom just over 30% live in small cities of less than 100 000 people and in rural areas. There are numerous organisations that provide adult-learning opportunities, including community programmes, literacy organisations, colleges and technical training programmes. There is also an articulation system aimed at increasing access to post-secondary education for students living in rural areas; however, rural youths are still 11% less likely than their urban counterparts to engage in any post-secondary education (Looker, 2009:2, 7). The literacy statistics for the provinces are troubling. The Organisation for Economic Co-operation and Development's (OECD, 2013) Programme for the International Assessment of Adult Competency (PIAAC) found that 45% of adult British Columbians and Albertans were at or below literacy level two (OECD, 2013:80). This means they lack the literacy skills required to understand newspapers, instruction manuals, health information and basic legal documents such as

rental agreements (Decoda Literacy, nd). High-school completion rates are further evidence of a need for adult education: on average, 84% of public-school students in British Columbia (BC Ministry of Education, nd) and 83% of students in Alberta complete high school (Alberta Government, 2018). This leaves more than 15% of public-school students unable to pursue further education, owing to the lack of a diploma. In addition, many students who successfully graduate from high school lack the prerequisites often required to further their education, such as the completion of science courses or minimum grades in English courses. With such limitations, individuals might struggle to pursue their goals and lack the skills required to engage in civic society, to voice their needs and to demand their rights. Yet the participation rates in all types of adult education in Canada sit at 50% (Livingstone & Raykov, 2013:3), and they are considerably lower when looking specifically at non-formal education, in which only 31% of Canadians participate (Conference Board of Canada, 2018). 'Non-formal education' refers to structured learning that results in knowledge or skills, but not credentials, including the language and literacy classes that, according to the statistics, are needed. Canada's participation rates are notably lower than those in other modernised countries (Rubenson & Desjardins, 2009; Conference Board of Canada, 2018). Despite the availability of statistics, there is a shortage of literature explaining the reasons for, and proposing solutions to, low participation rates.

Dealing with barriers

Rubenson and Desjardins' (2009) bounded agency model provides a useful framework for considering the reasons for a lack of participation in adult education. The model organises barriers to participation into three categories: situational, dispositional and institutional. Situational barriers include lack of time as well as family commitments, whereas dispositional barriers include personal insecurities, negative past educational experiences and a perception that there is not enough to gain by returning to school (Rubenson & Desjardins, 2009). Institutional barriers, such as financial reasons and the accessibility of courses, are the barriers that are most effectively addressed in western Canada.

Through Student Aid British Columbia and Alberta Works, students enrolling in most adult education programmes are able to access financial assistance for student fees, materials, transportation and childcare. In addition, students in Alberta may also receive cost-of-living assistance (Alberta Government, 2015). Rubenson and Desjardin (2009:118) argue that financial barriers 'lower the extent of participation, but may not entirely prohibit participation'. The assistance provided typically does not equate to the amount an individual may earn if they are otherwise employed, so students often choose to study part-time while working.

It is my experience that students' time commitments to work and home life combined with limited programme resources make providing appropriate course offerings, schedules and delivery modes challenging for providers of adult education. Some of the ways providers in small communities have responded to the challenges are by offering multilevel classes and varying delivery modes.

Multilevel classes make it viable to provide instruction to heterogeneous student populations in communities where there are insufficient students to provide single-level classes. Some examples of multilevel classes are Fundamental English at Selkirk College in the small city of Nelson, British Columbia, and government-sponsored Language Instruction for Newcomers to Canada (LINC) provided by Bow Valley College in the town of Banff, Alberta. Fundamental English is a course at pre-Grade 10 level; it is typically taken by adult basic education students, adult special education students and English-language students whose needs range across six levels of study. Similarly, Bow Valley College has accommodated six levels of LINC learners in two to three classes in Banff since the start of its regional stewardship initiative in 2011 (Bow Valley College, 2011). Another aspect of Bow Valley College's Regional Stewardship Program is providing LINC Homestudy, the online version of LINC classes.

Online learning is a growing alternative to traditional classes (McGreal & Anderson, 2007) for students who find scheduling to be a barrier to participation and also a way of increasing access to education for students living in areas without face-to-face classes. However, there is the question of personal suitability for online study. In addition to the obvious need for access to the Internet, online study requires study skills, self-discipline and computer competence, which the most disadvantaged adult students and the literacy and adult basic education students are less likely to have than those who have had positive past educational experiences. Therefore, online study is limited in its ability to serve those most in need. In the School of Academic Upgrading at Selkirk College, some students attend class regularly, others work independently and attend class only as needed or as is possible, and yet others study through remote delivery courses where their online contact with their course instructor is paired with face-to-face learning support provided by a local contact instructor. The remote delivery format has the benefit of increasing access to courses for students and providing additional work for teachers in very small communities. Instructors on the programme find that learner support must be plentiful and easy to access in order for many students to succeed.

Some methods of learner support are significant in getting educators to help students overcome the dispositional barriers of personal insecurities and negative past educational experiences; however, factors that can build barriers rather than remove them are beyond the control of organisations and institutions. For instance, educational programmes are vulnerable to sudden changes in government (Tucket, 2015), and this can threaten participation rates. For example, in 2015, the right-leaning Liberal government in British Columbia implemented tuition for adult basic education. Service providers then scrambled to put support in place for students who could not afford to pay the tuition fees and to implement new student-intake procedures that included funding applications. Two years later, when the left-leaning New Democrats came to power, they reversed the Liberals' decision and eliminated tuition fees for adult basic education (Government of British Columbia, 2017b). Although this was a welcome change, changes in administrative processes can easily deter prospective students who find navigating institutional structures daunting, paradoxically creating a barrier for adult learners.

Of all the dispositional barriers, however, a lack of perceived benefit is the most difficult to overcome because it is intrinsic to the belief that greater employability is the only reason for adults to go to school. Accordingly, the reasoning goes, if one is not unemployed, or at least not very unhappily employed, there is limited incentive to participate in adult education. The practicalities of going back to school to improve one's employment situation are difficult to argue with, and in themselves are nothing to take issue with. The problem is when employability is perceived to be the only reason for participating in adult education. Besides being practical, studying for greater employability, and therefore to earn more money, is also more tangible than the social justice perspective of empowering individuals through self-development. While there may be exceptions, the ability to act for oneself and to engage fully in society as a Canadian citizen is often largely a by-product of the adult-education experience rather than an objective of an individual course.

Viewed from this perspective, learning that fosters equity and creates the capacity for social justice occurs incidentally rather than as part of a curriculum. Two illustrations derive from my own classroom. In the first, a student in a writing class learnt about labour unions through a reading intended as an example of a cause-and-effect essay. The student proclaimed not to know anything about unions prior to the reading and felt strongly that the peer group would also lack that understanding. A lengthy class discussion ensued, which led the students towards a new or increased awareness of labour unions. In the future, this awareness may equip them to use a union to ensure that their needs are met and their rights are respected in the workplace.

The second example occurred in a class in which the course objectives focus on learner success through personal development. In a lesson on learner awareness, a student spoke of recently learning that education is a right. This had never been understood throughout the student's troubled school history; instead, the student's struggles in education had been regarded as a personal failing. With this new understanding, the student feels entitled to an education and is now better able to insist on obtaining what is needed for personal success. This type of knowledge is what is required for individuals to participate fully in society and to achieve a socially just and equitable society.

As argued above, the need for adult education to foster social justice and equity is often overlooked. Dealing with this belief is what Canadian educators and policymakers have ignored in their attempts to remove barriers to participation and success in the case of adult learners. Around the world, there is a growing acknowledgement that culture plays a significant role in either fostering or discouraging adults' decisions to return to school. Despite its focus on the global economy, the OECD (2013:188) attributes significant differences in adult education participation rates in developed nations to 'major differences in learning cultures'. And UNESCO's Education for All: 2000–2015 Achievements and Challenges report indirectly touches on the role of culture with its findings on who is most likely to participate in adult learning. The first finding is that the candidates most likely to participate in adult learning are those who already hold a diploma (UNESCO, 2015:128). This is true for almost every country, and Canada is no exception. In Canada, those with a high school education are almost 1.5 times more likely to pursue further learning than those who do not have a high school education (UNESCO, 2015:129). From this, one can infer that those individuals had a positive enough

initial educational experience not to be deterred from further study; furthermore, one can argue that those individuals saw the value of education beyond employability. Admittedly, research is needed to test this argument, but statistics from Canada's neighbouring country, the United States, indicate that 69.6% of the students in post-secondary programmes surveyed indicated that ideas and an appreciation of ideas were very important in their decision to study (Sledge & Fishman, 2014:13). The second of UNESCO's (2015:128) findings that is further evidence of the link between cultural beliefs about adult education and participation is that the candidates most likely to participate in adult education are those with educated parents – indicating that there is a culture of learning in the family. Given that culture is learnt from the first days of life (Miller, Van Esterik & Van Esterik, 2001:18) and that families are cultural carriers, it follows that the children of well-educated parents hold the value of learning for all as a cultural belief and that the children of less-educated parents do not.

Links between adult education and employability

Ideally, the belief in the value of education apart from employment would spread from the educated to the less educated, but this is contrary to the ideological trend of the past five decades which ties adult education to employment. At its inception, adult education was believed to improve society by fostering equality and giving citizens agency in times of change (Rubenson & Walker, 2006). However, this belief has shifted over time. Through the 1980s and 1990s, this ideology that centred on socio-emotional well-being was transformed into one where that well-being was tied directly to one's earning potential (Rubenson & Walker, 2006). Indeed, it was in 1985 that the economy first appeared as a concern: at UNESCO's International Conference on Adult Education (Milana, 2012:786), which brought into focus the emergence of globalisation and its focus on the economy (Dreher, Gaston & Martens, 2008:2), a cultural belief was fostered that the sole reason for pursuing adult education is to secure either employment or employment with greater earning potential. Today, this is evident in western Canada's marketing of adult education, in industry influence on curricula, and in government policies and programmes.

Community colleges' marketing and public relations routinely focus on the employability of their graduates. Bow Valley College in Alberta, for instance, has regularly used the marketing tag line, 'Learn a better living', and, in 2013, the premier of the province praised it for producing graduates who 'are able to meet the province's diverse economic needs' (Bow Valley College, 2011). In British Columbia, Vancouver Community College (nd) advertises on its website that 95% of its graduates are employed, and the website of the British Columbia Colleges association (2017–2018) states that 'colleges provide real opportunities and pathways to employment', illustrating how the social justice aspect of education for adults is either ignored or trumped by employability up to the highest academic levels. This contrasts significantly with a web page of the University of British Columbia Library (17 September 2018) which shines a spotlight on a library exhibition on LGBT2SQIA (lesbian, gay, bisexual, trans (transgender, genderqueer, non-binary) two-spirit, queer, questioning, intersex and asexual) history, and another web page of the University (nd) which has a research chair proclaim, 'We'll never stop fighting for equality'.

Other evidence of the tight link between adult education and employability in Canada is the increasing influence of industry in educational programming. Community colleges partner with stakeholders through groups such as the Kootenay Regional Workforce Table situated in south-central British Columbia as an integral part of programme planning and development. The purpose of the group is to 'identify economic development opportunities and to make recommendations on training programs to meet the demand for jobs in the area' (Kootenay Regional Workforce Table, 2013). Although pragmatic, the difficulty with this type of collaboration is that pedagogical considerations are replaced by immediate industry needs (Sumner, 2008:35), which forces programming to be narrow and short-sighted. This results in bare-bones, intensive programmes that neglect the fostering of global citizens (Bishundayal, 2014).

Post-secondary marketing and industry influence in post-secondary programme and curriculum planning are the result of government policies and programmes aimed primarily at building the nation's workforce. This is problematic, because a narrow focus on worker skills and training pushes literacy, citizenship and personal development (Horvat, 2014:12, 30) into the background, where it is presented as an afterthought. Proof of this lies in rhetoric such as this passage from The Conference Board of Canada (2018):

> Investing in education and training opportunities beyond one's initial schooling years – whether for maintaining, upgrading, or repurposing the skills of a labour force – is essential in the face of increased global competition and changing demographics, as well as for tackling socio-economic imbalances like unemployment, poverty, poor health, and other social exclusions.

This text only hints at social justice in the final thought. Unfortunately, the most prominent government messaging promotes adult education for employment exclusively. Both Alberta and British Columbia have government agencies tasked with growing their provincial workforces: Alberta Works and WorkBC. Work BC's Skills for Jobs Blueprint: Re-engineering Education and Training initiative, launched in 2014, states that education and training programmes that align with high-demand jobs will be funded (Government of British Columbia, 2014:12) and that

> [r]eliable and up-to-date information will support our goal to better match training and education with industry needs and provide the best information on labour market trends to educators, counsellors, students and their families. This would not be problematic if there were also significant initiatives aimed at creating social justice and equity in our communities, but that is clearly not the case, because literacy and adult basic education programmes are replaced by work skills programmes (Horvat, 2014:30).

The cumulative effect of government actions and messaging is to reinforce the belief that employment is the purpose of adult education. As a result, participation rates will fluctuate with economies and adult education will do more to create income equity than to address broader inequalities in society.

Some research indicates that the rate of participation in adult education fluctuates with unemployment rates (Pennington, McGinty & Williams, 2002; Rubenson & Walker, 2006). Although there is research that challenges this belief, the current economic conditions and participation rates in British Columbia and Alberta support a correlation between unemployment and adult education participation rates and the claim that a cultural belief in education only as a means to employment is a significant factor in participation.

British Columbia currently has some of the lowest unemployment rates in Canada, ranging from 4.6 to 5% in urban areas and from 6.2 to 7.7% in southern communities, and up to 9.4% in northern communities (Government of Canada, nd). The participation rates at Selkirk College's School of Academic Upgrading and Development are correspondingly low (Selkirk College, nd). Allison Alder (2018), the school chair, reports that registration numbers are significantly lower at approximately 100 students compared with 150 on the programme the previous year. The college president also reports a downward trend in domestic enrolments over the past three years (Graeme, 2018). In contrast, Alberta is in the midst of an economic downturn, with unemployment rates at 6.4% and 8.3% in the two major cities, and at 6.8% and 10.6% in the southern and northern communities, respectively. With these uncharacteristically high rates, the number of students enrolling in adult education at Bow Valley College is strong (Imai, 2018). A further factor contributing to increased participation in adult education is federal government employment insurance (EI) programmes that allow individuals to take courses or undergo training while collecting EI (Government of Canada, 2018). Therefore, some individuals are opting out of participation in adult education until a lack of employment opportunities prompts them to return to school.

Under these conditions, adult education may serve only to create income equity rather than deal with broader inequities in society. In addition to reporting that Canadians participate less than citizens in other developed countries, The Conference Board of Canada indicates that Canadians have significantly fewer hours of instruction when they do participate. In 2008, Canadians received approximately 49 hours of instruction compared with 61 to 105 hours in European countries (The Conference Board of Canada, 2018). The less time adults spend at school, the fewer opportunities they will have to develop skills and knowledge for active citizenship and to develop the sense of agency necessary to be an advocate for themselves, their family and their community. The less obvious reason is that the focus on employment skills in adult education means that, in addition to having work-ready graduates spend less time in school, the curricula are trimmed to provide them with a shorter timeline than past programmes that had more well-rounded curricula.

Moving towards a new discourse

With the exception of Rubenson and Desjardins' (2009) work on the bounded agency model, the available research into participation in adult education has been quantitative. This research tells educators and policymakers how many workers are needed in specific fields and how many adults participate in education, but it does not provide what Connolly (2016) refers to as 'really

useful research'. 'Really useful research' recognises the need for qualitative knowledge alongside quantitative evidence and placing the evidence in the broader social context in order to make possible a deeper understanding of, for instance, Canadians' dispositional barriers to participation in adult education. It is also needed so that the hypothesis presented here – that a cultural belief in adult education only as a means to employment is responsible for low participation rates – can be tested. Such 'really useful knowledge' (Connolly, 2016) would make space for change in the adult education discourse in Canada.

Conclusion

The evolution of adult education has seen the narrowing of discourse about it from personal development and citizenship to employability. This has led to the belief that the sole purpose of adult education is to improve one's work prospects. In the context of relatively low unemployment in western Canada, this means that participation in adult education is low despite low high-school graduation rates and low literacy rates. Furthermore, the efficacy of educators' efforts aimed at removing situational and institutional barriers is reduced by the dispositional barriers which lead prospective Canadian students to conclude that, when one has a job, there is insufficient motivation to participate in adult education. Cultural beliefs must be determined and dealt with in order to increase participation rates and create opportunities in which adult education can make a significant contribution to social justice and equity. It is time for the adult education discourse to shift away from 'training people to adapt to the current economic order' (Sumner, 2008:35) towards fostering the capacity of citizens to participate fully in society.

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Access and barriers to post-school education and success for disadvantaged black adults in South Africa: Rethinking equity and social justice[1]

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ABSTRACT

Widespread national higher education student protests against proposed fee increases and demands for free higher education in South Africa that arose towards the end of 2015 drew international attention to disadvantaged students' socio-economic conditions and the barriers that deter access to higher education. Adults' experiences of socio-economic barriers to accessing post-school education are similar. Drawing on theoretical frameworks and secondary data, I conceptualise a distributive justice perspective on access for disadvantaged black adults premised on the relationships between interrelated equality rights and socio-economic rights, principles of social and economic justice, and redistributive policies.

KEYWORDS

access; barriers; adult learners; disadvantaged black adults; adult education; post-school education; equity; social justice; distributive justice[1]

1 This article was produced with support from the Teaching and Learning Development Capacity Improvement Programme, a partnership programme between the Department of Higher Education and Training and the European Union. Its content is the sole responsibility of the author and does not necessarily reflect the views of the Department or the European Union.

Introduction

The South African government's National Development Plan (National Planning Commission, 2012) and the White Paper for Post-School Education (DHET, 2013) are among the prompts for writing this article.

I make the argument that the overwhelming majority of learners in post-school education can be considered adults. According to the White Paper, the government intends to establish, for adults, one million learning opportunities in community colleges and further opportunities through other post-school education institutions and initiatives by 2030 (National Planning Commission, 2012:59–61; DHET, 2013:xiii–xiv). In the DHET's White Paper (2013:4), it admits that

> [d]eep-seated inequalities are rooted in our past; it is not by accident that the remaining disparities of wealth, educational access and attainment, health status and access to opportunities are still largely based on race and gender.

To address such racial inequality, the DHET (2013:5) states:

> Education has long been recognised as providing a route out of poverty for individuals, and as a way of promoting equality of opportunity. The achievement of greater social justice is closely dependent on equitable access by all sections of the population to quality education.

I make the assumption that the government's intention to create one million learning opportunities in community colleges and through other initiatives by 2030 (DHET, 2013:xiii–xiv) is to target disadvantaged black adults and make post-school education 'a route out of poverty for individuals' (DHET, 2013:5). Given the statistics showing that the overwhelming majority of disadvantaged adults are black, I focus this article on access to post-school education for disadvantaged black adults, also referred to as 'black adults'.

Creating more than one million adult education opportunities, and access to them, requires the government to remove structural and institutional barriers related to funding that create socio-economic barriers undermining access for potential black adult learners. According to UNESCO (2008:10), 'adult literacy refers to programmes for the 15+ age group; within that, youth literacy most frequently refers to the 15–24 age group'. In view of the latter, I consider all learners in post-school education who are 15 years and older to be adult learners.

How can the government realise, for disadvantaged black adults, equality rights and socio-economic rights to social assistance that enable them to overcome their socio-economic barriers, and realise fair equality of opportunity and equitable access to post-school education as a 'route out of poverty' and as a social justice benefit?

This is the main question that this article responds to through the development of a conceptual framework.

To engage with this question, I adopt a distributive justice perspective that is predicated on conceptualising the relationships between interrelated equality rights and socio-economic rights, principles of social and economic justice, and distributive policies. These comprise four building blocks: (1) disadvantaged black adults; (2) interrelated equality rights and socio-economic rights; (3) social and economic justice principles; and (4) redistributive policies and social assistance.

To adopt this perspective, I draw deliberately and primarily on the South African academic literature to frame the central arguments in this article. I rely to a lesser degree on international scholars' literature about South Africa. Moreover, I acknowledge that there is an international literature concerning access, adult education and social justice, which I have drawn on. Boyadjieva and Ilieva-Trichkova (2017), in particular, provide a succinct review of some related literature that has emerged since 2003.

There are undoubted economic, social and cultural benefits of access to post-school education. However, as levels of poverty and inequality are extremely high in South Africa, and the government considers education as 'a route out of poverty', my focus in this article is on the economic benefits only.

I conclude that, when disadvantaged black adults achieve their equality and socio-economic rights to 'social assistance' which lead to equitable access to post-school education, the latter can become 'a route out of poverty' and a means of promoting equality of opportunity and social justice.

Disadvantaged black adult heads of households, education and poverty

The first building block of my theoretical perspective is a profile of disadvantaged black adults on whom the article focuses, in particular black adult heads of households.

My understanding of an embedded assumption in the White Paper (DHET, 2013) is that access to, and successful completion of, post-school education could raise disadvantaged black adults' levels of education. This, in turn, would enable them to secure income-generating opportunities, employment or higher-paid employment and, as a consequence, to shift out of poverty. However, several factors determine successful completion of post-school education and the possibility of it enhancing adults' employability and of improving their chances of finding employment and earning a sustainable income that could continue to reduce their poverty.

Black adult heads of households and the persistence of poverty

In his study of poverty and inequality in South Africa, May (2000:xiii) found that 50% of the population in 1993 were considered to be poor. By 2009, there were few indications of dramatic

change. Wilson (2011:1–2) states that 'poverty is so widespread that somewhere between 40 and 50 per cent of the population is living without adequate means'. Substantiating his claim, Wilson cites Leibbrandt (2010, as cited in Wilson, 2011:2), who reveals the following:

> In terms of poverty, the bottom 30 per cent of the households all earn well under R20 000 per annum …, while we know from more detailed statistics that 70 per cent of the population earns only 17 per cent of the total income.

Zizzamia, Schotte and Leibbrandt's (2019) analysis of the National Income Dynamics Study (NIDS) data for the first five waves provides significant insights into the levels of household poverty in South Africa during the period 2008 to 2017. Their findings with regard to 'spells of poverty' showed that, over the period 2008 to 2017, 40.08% of African household heads were 'always poor' and 8.83% were 'never poor'. In contrast, they found that, among white household heads, 0% were 'always poor' and 93.55% were 'never poor' (Zizzamia et al., 2019:13). The persistence of poverty among African household heads is revealing and the inequality between African and white heads of households is startling.

Adult household heads, poverty and low levels of education, 1993–2017

In their study of the period 1994 to 2010, Branson and Leibbrandt (2013:6) found: 'There has been a rapid increase in educational attainment in the past three decades, yet much of the increase is at the secondary, and often incomplete secondary level.'

In Leibbrandt, Wegner and Finn's (2011) study on income inequality and poverty, they identified the following quintiles: no education (Noedu); primary education; incomplete secondary (IncSec); matric; and tertiary. Reporting on their findings of a study during the period 1993 to 2008, they highlight worrying trends: 'Individuals with low or incomplete secondary education were more likely to be worse off in 2008, compared to 1993' (Leibbrandt et al., 2011:1). Painting a gloomy picture, they reveal: 'For no education, primary [education] and incomplete secondary households, the general trend was towards greater concentration in the lower quintiles' (Leibbrandt et al., 2011:10). In other words, adults with low levels of education are migrating into the lowest income groups. Of concern here is that 'there is a lot of shifting in both directions for those households headed by an individual with an incomplete secondary education' (Leibbrandt et al., 2011:10). Most alarming, however, is that 'matric households see shifts out of the top quintile and into the 3rd and 4th quintile' (Leibbrandt et al., 2011:10).

Of interest, yet fairly predictable, is that 'the most significant trend to come out of the data is that households headed by individuals with tertiary education become increasingly more likely to be in the top quintile' (Leibbrandt et al., 2011:10). Of concern is the assertion by Leibbrandt et al. (2011:10) that, in contrast to households headed by tertiary education graduates, 'the likelihood of being in one of the lower income quintiles increased in the period between 1993 and 2008' for all other education groups, 'with matric-headed households experiencing a sharp decline'.

The analysis by Zizzamia et al. (2019:30) of the first five waves of the NIDS data for the period 2008 to 2017 confirms that these trends are continuing. Their classifications of social class (2019:26) are useful in understanding the levels of education and poverty among 'chronic poor', 'transient poor', 'vulnerable', 'middle-class' and 'elite' household heads. They report that, among the 'chronic poor', 25.14% have no schooling; 28.54% have not completed Grades 1 to 6; 11.03% have completed Grade 7; 32.26% have not completed Grades 8 to 11; 2.82% have completed Grade 12; and 0.22% have completed tertiary education.

Their research findings about household heads reveal the relationship between levels of education and levels of poverty: of household heads with less than a matric (Grade 12) level of education, 41.87% are 'always poor', as opposed to 7.41% who are 'never poor'; of household heads with a matric level of education, 11.65% are 'always poor', as opposed to 43.50% who are 'never poor'; and of household heads with a tertiary education, 1.26% are 'always poor', as opposed to 62.51% who are 'never poor' (Zizzamia et al., 2019:12). They sum up: 'Those in households with household heads [who have] less than matric are much more likely to experience multiple spells of poverty than those in households with better educated household heads' (Zizzamia et al., 2019:12).

These research findings show a correlation between household heads' levels of education, income and increasing poverty. I therefore suggest that, for disadvantaged black adults who are household heads, a strong possibility exists that they may qualify for precarious employment only and, consequently, experience limited regular income, which could result in poverty. Such poverty poses a socio-economic barrier which creates unequal opportunities for disadvantaged black adults that deter the enjoyment of the equality right of access to post-school education.

To contextualise this correlation between low levels of education and impoverishment, and to consider the extent to which post-school education can become a 'route out of poverty', I refer to recent academic research that has generated scholarly debates about the state of poverty and inequality in South Africa.

Poverty is reducing and inequality increasing

In examining the historical roots of such inequality, Wilson (2011:10) concludes:

> The net result of all this history was that by 1993, on the eve of the assumption of power by South Africa's first democratic government, the distribution of human capital in the country was such that a deep racial inequality was embedded at the very heart of the modern industrial economy.

In 2010, Leibbrandt, Woolard, Finn and Argent (2010:12) summed up the situation as follows: 'South Africa has an infamous history of inequality with an overbearing racial stamp. The issue of inequality has continued to dominate the post-apartheid landscape.' Moreover, Leibbrandt et al. (2011:2) reveal the persistence of inequality: 'Aggregate inequality measures have shown

an increase in inequality over the post-apartheid years.' Citing Leibbrandt's empirical research, Wilson (2011:1–2) exposes the extreme state of inequality as follows: 'Indeed the richest 10 per cent – with income over R400 000 per household – alone earns more than the other 90% combined.'

But research shows that poverty is reducing, albeit minimally, but that inequality is increasing.

Lamenting the minimal successes in addressing poverty and inequality, Wilson (2011:3) states:

> Despite its best intentions, despite every effort to develop the most effective policy and despite the firm expectations of its voters, the democratic government of the new South Africa has been able to do little to shift the levels of poverty, of unemployment and of inequality which it inherited from the apartheid regime in 1994.

Recently, Branson and Leibbrandt (2013:5) reiterated that 'reducing poverty and inequality are key challenges in South Africa'. In a similar way, Van der Berg writes: 'Income inequality is a matter of great concern in South Africa. But so, indeed, is poverty' (2014:197). Income inequality is determined by different instruments and techniques. According to Leibbrandt and Woolard (2001:675),

> [a] busy international literature has developed around the derivation and refinement of techniques for decomposing inequality measures (in particular the Gini coefficient) by income sources. Such decompositions highlight those income sources that are dominating the distribution of income and, as such, offer a bridge between the description of inequality and the key economic processes generating inequality in a society. In South Africa these techniques have been seen to be particularly well suited to assessing the importance of wage income in driving household income inequality.

Proffering some advice, Wilson (2011:3) opposes the belief that 'old-style economic growth alone … would be sufficient to overcome the legacies of poverty and inequality'.

Despite the fact that statistics show a decrease in levels of poverty, the incidence of poverty is 'critically high'. Structural constraints evident in South Africa's context of poverty and inequality prompt a deeper investigation of the main question that this article addresses.

Access to post-school education: A route out of poverty for disadvantaged black adults?

The second building block of my theoretical perspective, 'interrelated equality and socio-economic rights', is informed by law scholars who advocate that interrelated equality and socio-economic rights be harnessed to accomplish the realisation of equality rights in the South African context of poverty and inequality.

The government established the post-school education sector after the promulgation of the South African Constitution. As it incorporates adult basic education, technical and vocational education and training (TVET), higher education and workplace-based learning programmes, one could conclude that most learners in post-school education are adults, which is the reason for my focus on this age group.

The Constitution, in section 29(1), includes adult basic education as an equality right (and a basic human right) for all adults, expressed as follows:

> Everyone has the right –
>
> (a) to a basic education, including adult basic education; and
> (b) to further education, which the state, through reasonable measures, must make progressively available and accessible.

To focus attention on adults in post-school education, I use as my starting point adult basic education as an equality right and argue that the Constitution promotes 'education for adults', that is, adults in post-school education.

In the South African context, however, the human right to education is also an 'equality right'. Christie (2010:9) contends that 'rights do not necessarily mean equality. This is particularly so in conditions of profound social inequality, as the South African situation illustrates well.' As an alternative, Christie (2010:9) promotes 'the status of education as a second-generation, socio-economic right'. While I agree with Christie, and following legal scholars' arguments, I propose that equality rights and socio-economic rights to post-school education be interrelated premised on the following arguments.

Shifts in the debates about the limitations to securing education as a constitutional right mirror the changing debates among legal scholars about the failure to secure constitutional rights for citizens – in this instance, black adults who are disadvantaged by the socio-economic conditions that create poverty and socio-economic inequality. Pointing to the limitations of equality-based approaches are legal scholars Dugard (2004), Fredman (2007) and Fredman (2011), who alert us to the significance of socio-economic rights in addressing the transformation goals of the South African Constitution. Converging with the latter, Fredman (2011:585) stresses the importance of socio-economic rights, arguing that

> [t]he South African Constitution has the advantage of containing express socio-economic rights. However, these rights are qualified: they do not give rise to immediate entitlements, but instead require the State to take reasonable measures within available resources to realise the right progressively. The equality guarantee in section 9, by contrast, gives an immediate right to equality.

What can we consider reasonable after 25 years of democracy? Following Fredman and other scholars, I contend that the pace of the progressive realisation of socio-economic rights to resources has been too slow and that this is contributing to a minimal decrease in poverty and to increasing inequality.

Liebenberg and Goldblatt (2007) discern an interrelatedness between equality rights and socio-economic rights. Similarly, Fredman (2011:585) proposes that the interrelatedness between equal rights and socio-economic rights be recognised for the purposes of reducing poverty, declaring that 'the equality guarantee can considerably strengthen socio-economic rights' as a response to the 'potential and limits of an equal rights paradigm in addressing poverty'.

Pertinent to the assertion that post-school education is a 'means to promote equality of opportunity' is Fredman's (2007:214) assertion that status-based inequalities are generally dealt with through constitutional rights and socio-economic inequalities by way of social policy. However, she challenges the distinction between these and proposes that we consider them as interdependent instead. I agree with her on the following grounds. As the status-based inequalities reflected in the statistics show that the overwhelming majority of black people are poor, I assert that these are also socio-economic inequalities. In a scenario where income in the higher quintiles did not increase substantially, such social assistance could reduce both poverty and income inequality.

In the light of this interpretation, I propose that the application of interrelated equality rights and socio-economic rights to post-school education provides the rationale for framing socio-economic rights to social assistance and promoting equality of opportunity. Such financial assistance could enable disadvantaged black adults to deal with their socio-economic barriers and achieve equitable access to post-school education as 'a route out of poverty' and as a social justice benefit. Such social assistance, however, may not necessarily address 'socio-economic' inequalities and 'status-based inequality'.

Critical questions arise: 'What should the rationale be for the distribution of such public funds?', and 'What principles should be used to select disadvantaged black adults as beneficiaries?'

To respond to these questions, in the next section I discuss a third building block of my theoretical perspective 'social and economic justice principles'.

Social and economic justice principles and access to post-school education: A 'route out of poverty'?

Knight (2014:23) proposes three theories of distributive justice: 'justice as fairness' (Rawls, 1999), 'utilitarianism' (Bentham, 1970) and 'luck egalitarianism'. Kymlicka (2002) suggests large-scale, non-racial 'redistribution to the benefit of the poor, who in South Africa are predominantly black'.

Building on Knight's (2014) proposition, I derive four principles of social and economic justice from the following theories of justice: Rawls's (1971; 2001) 'theory of justice' and 'justice as fairness'; Van der Walt's (2004) 'transformation-based approach to the theory of social and economic justice'; and Knight's exposé of Bentham's (1970) theoretical perspectives about 'utilitarianism'.

The following principles constitute the third building block of my theoretical perspective: (1) advantage to disadvantaged black adults; (2) equal right to post-school education for disadvantaged black adults; (3) conditions of fair equality of opportunity for disadvantaged black adults; (4) redistribution 'above and beyond the minimum threshold' for disadvantaged black adults. I explain each of these four principles below.

Within the broader parameters of my theoretical perspective, these principles, premised on relationships between interrelated equality and socio-economic rights, social and economic justice principles, and redistributive policies, could provide the underpinning rationale for the distribution of public funds and the selection of disadvantaged black adults as beneficiaries of social assistance that could make possible access to post-school education.

Social and economic justice principle 1: Advantage to disadvantaged black adults

According to the social and economic justice principle 'advantage to disadvantaged black adults', black adults should be considered as the primary beneficiaries of social assistance in order to give them access to post-school education. These are further characterised as 'least-advantaged members of society' (Rawls, 2001:42) who experience 'extreme need or deprivation', according to Michelman (Van der Walt, 2004:273), and who are the 'worst off' (Knight, 2014:31).

Disadvantaged black adults are the 'least-advantaged members of society as individuals'
As discussed earlier, research findings show that disadvantaged black adults experience poverty that arises from socio-economic inequalities and that these create socio-economic barriers which prevent them from enjoying basic human rights and 'fair equality of opportunity' to access post-school education.

Concerned about the fulfilment of basic rights in relation to social and economic inequalities in a democratic society, Rawls (2001) argues that 'fair equality of opportunity' should constitute 'the greatest benefit of the least-advantaged members of society', whom he describes as earning 'income below the median income in society' (Rawls, 2001:42). Furthermore, he states (2001:42) that 'disadvantaged black adults' who are in the bottom quintiles and who have limited or no income can be characterised as 'least-advantaged members of society'.

It is important to point out that Rawls (2001:38) developed his theory of justice premised on democratic societies, specifically the United States. Rawls's (2001:5) theory draws

attention to the 'least-advantaged members of society' living in democracies who are disadvantaged by socio-economic inequalities. While South Africa is not comparable to the United States in relation to levels of affluence, both societies are classified as 'democracies' and are characterised by similar kinds of social and economic inequality, which prompted Rawls's prioritisation of 'least-advantaged members of society'.

Given that the overwhelming majority of poor South Africans are black, I argue that 'the least-advantaged members of society' are black disadvantaged people who earn the least income.

Disadvantaged black adults experience 'extreme need or deprivation'

American legal scholar, Frank Michelman (1969), developed a 'needs-based theory of social (and economic) justice' according to which people who experience 'extreme need or deprivation' feature as his central concern. His identification of this grouping of people is instructive, because there are among 'disadvantaged black adults' those who experience extreme need or deprivation. According to Michelman's theory, those who experience extreme need or deprivation should be provided with a minimum threshold of social insurance 'before other distributive concerns are considered' (Michelman, 1969 in Van der Walt, 2000:289).

Disadvantaged black adults are the 'worst off'

Drawing on Rawls, Knight (2014:31), with reference to South Africa, asserts that righting inequalities 'requires that distributions maximize the income and wealth of the worst off'. Who are the 'least-advantaged members of society' or the 'worst off' in South Africa that could be considered as the potential beneficiaries of 'social wage stipends'? According to Statistics South Africa (2017:8):

> Social wages in South Africa are provided through a wide array of mechanisms. This includes free primary health care; no-fee paying schools; social protection (most notably old-age grants and child support grants); RDP housing; and the provision of free basic services (namely water, electricity and sanitation) to poor households.

Based on this explanation, I define a 'social wage stipend' as a regular payment that augments other forms of 'waged income'.

Giving the advantage of 'social assistance' to 'disadvantaged black adults' who are the 'least-advantaged members of society', people who experience 'extreme need or deprivation', the 'worst off', 'chronic poor', 'transient poor', and 'vulnerable' (Zizzamia et al., 2019:22), could enable them to surmount their socio-economic barriers, achieve 'equal rights' and 'equality of opportunity' and attain access to post-school education as a 'route out of poverty' and as a social justice benefit.

Social and economic justice principle 2: Equal right to post-school education for disadvantaged black adults

This principle promotes an 'equal right to post-school education for disadvantaged black adults' and is informed by Rawls's theorisation of 'society as a fair system of cooperation between citizens regarded as free and equal' (2001:42).

Rawls (2001:3) posed a key question: 'What principles of justice are most appropriate to specify basic rights and liberties, and to regulate social and economic inequalities in citizens' prospects over a complete life?' Implicit in this pertinent question are conceptualisations of the interrelationships between distributive justice, basic rights, and addressing social and economic inequalities, which underpin the central concern of this article. To address this question, Rawls (2001) presents the following revised statement of the two principles of justice (the second principle is stated below), first:

> (a) Each person has the same indefeasible claim to a fully adequate scheme of equal basic liberties, which scheme is compatible with the same scheme of liberties for all (Rawls, 2001:42).

Given that the government's constitutional imperatives are intended to respond to inequalities, I argue that the above principle of justice is relevant to considering the realisation of the equal right to post-school education that benefits disadvantaged black adults as 'the least-advantaged members of society'.

Social and economic justice principle 3: Conditions of fair equality of opportunity for disadvantaged black adults

This principle promotes 'conditions of fair equality of opportunity for disadvantaged black adults', which I derive from Rawls's second principle discussed in his revised statement:

> (b) Social and economic inequalities are to satisfy two conditions: first, they are to be attached to offices and positions open to all under conditions of fair equality of opportunity; and second, they are to be the greatest benefit of the least-advantaged members of society (the difference principle) (Rawls, 2001:42).

The White Paper (DHET, 2013) views post-school education 'as a way of promoting equality of opportunity'. This resonates with Rawls's second principle. Knight's (2014:29) interpretation for the South African context is useful: namely that Rawls's principle of 'fair equality of opportunity' extends beyond the sphere of employment. Knight (2014) asserts that 'Rawls understands it as requiring that "those with similar abilities should have similar life chances"'(Rawls, 1999:63). Knight (2014) points out that the imperatives to address inequality make Rawls's (2014:29) proposition appropriate to considering 'fair equality of opportunity' in

education. He claims that 'affirmative action in South Africa might be justified on a Rawlsian basis, as necessary to secure good opportunities for those with good abilities who are impended by poor education' (Knight, 2014:29).

I pointed out earlier that rights-based approaches are limited in establishing 'conditions of fair equality of opportunity' for all. Socio-economic rights in South Africa's Constitution can be interpreted as those which secure 'conditions of fair equality of opportunity'. Institutionalising socio-economic rights in concert with the 'difference principle' constitutes the rationale for distributing social assistance for disadvantaged black adults so as to grant them access to post-school education as a 'route out of poverty' and as a social justice benefit.

Social and economic justice principle 4: Redistribution 'above and beyond the minimum threshold' for disadvantaged black adults

This principle, 'redistribution "above and beyond the minimum threshold" for disadvantaged black adults' is informed by Van der Walt's 'transformation-based approach to the theory of social justice' (2004:291).

Van der Walt (2004) draws on Michelman's (1969) theory of distributive justice predicated on a 'needs-based theory of social (and economic) justice' that draws attention to people who experience extreme need – which, in essence, refers to socio-economic need. Such need prompts thinking about the importance of socio-economic rights, which 'ensures that a minimum threshold of social insurance should be provided before the normal economic balancing of rights can take place' (Van der Walt, 2004:273). For the purposes of this article, I interpret social insurance in the South African context as social assistance.

Citing as an example the post-apartheid government's 'redistribution-of-property' programme to provide access to land 'through various state-sponsored programmes involving state subsidies, grants and incentives', Van der Walt (2004:305) alerts us to the importance of redistribution for access to education, among other things.

While Van der Walt criticises certain aspects of Michelman's theory, he concedes that the real power of the theory emerges from the fact that Michelman translates the moral obligation arising from the extreme need into a constitutional duty (Van der Walt, 2004:290).

Van der Walt's (2004:291) 'transformation-based theory' therefore offers theoretical premises to combine 'interrelated equality and socio-economic rights' with the principle of 'above and beyond the minimum threshold' (Van der Walt, 2004:305–306); together, these should make possible, through redistribution, the access of disadvantaged black adults living in extreme poverty to post-school education as a route of poverty.

Like 'least-advantaged members of society', adults who experience extreme need or deprivation also experience low levels of education, or no schooling. The principles of social and economic

justice that can be derived from this theory imply that funding, such as public funds, should be distributed in order to attain a 'minimum-and-beyond threshold' of social insurance or social assistance. If this principle is applied, and such funding is sufficient, it could enable access to post-school education.

Social and economic justice principle 5: Non-racial radical redistribution for disadvantaged black adults

This last principle, 'non-racial radical redistribution for disadvantaged black adults', is derived from Knight's (2014) assertion that three theories of distributive justice pertain:

- 'Justice as fairness' (Rawls, 1999);
- 'Utilitarianism', which he refers to as 'having a corresponding theory of justice, which equates distributive justice with maximizing welfare' (Knight, 2014:26), and
- 'Luck egalitarianism', which 'seeks to make distributions sensitive to individual exercises of responsibility or, what it takes to be the same thing, equalize or neutralize the influence of luck on people's prospects' (Knight, 2014:27).

These theories imply a large-scale, non-racial 'redistribution to the benefit of the poor, who in South Africa are predominantly black' (Knight, 2014:13). More specifically, he asserts

that utilitarianism delivers a broadly similar result to Rawlsian justice in the South African context. It recommends a radical redistribution of resources from the rich to the poor, and does so on a non-racial basis (Knight, 2014:11).

'This combination of redistribution and affirmative action with non-racialism', Knight (2014:13) declares, 'is a promising basis for addressing some of South Africa's most pressing problems, including its outrageous poverty.'

Redistributive policies and social assistance: A route out of poverty and inequality?

The fourth building block of my theoretical perspective is redistributive policies and social assistance. Here, I point out that securing socio-economic rights to social grants has contributed to poverty reduction, and could therefore be instructive in considering ways of securing socio-economic rights to 'social wage stipends' as social transfers in order to foster access to post-school education.

It is evident that redistributive policies and mechanisms include social grants as a strategy for redistribution that benefits poor South African citizens. Leibbrandt et al. (2011:7) explain that 'redistributive policies consist of direct social transfers that include both social insurance and social assistance'. Given the extent of poverty and inequality, the post-1994 government provides social insurance through the Unemployment Insurance Fund (UIF) and social assistance consists of the Older Person's Grant (formerly the Old-Age Pension) and the Child Support Grant.

Some social and economic justice principles derived from Michelman's 'needs-based theory of social justice' (Van der Walt, 2004:272) and Rawls's (2001:39) 'justice as fairness' are evident in the similarities between the selection of beneficiaries of social grants and the potential beneficiaries of 'social assistance' to make possible access to post-school education. These beneficiaries are 'disadvantaged black adults' who are the 'least-advantaged members of society', people who experience 'extreme need or deprivation' and 'the worst off', who have access to little or no income through disadvantage created by adverse socio-economic conditions of poverty and inequality.

This view is supported by Leibbrandt et al. (2011:1), who argue that

> [g]overnment policies – especially social grants – have also been central in lifting people out of poverty. At the same time, these policies have not succeeded in reversing inequality trends and in providing equal opportunities for all South Africans.

Concurring with Leibbrandt et al. (2011) are Bhorat, Tseng and Stanwix (2014), who showed that social grants or social transfers have contributed to reducing household poverty. Using data from the 1995 and 2005/2006 Income and Expenditure Surveys (IESs), they show that

> at the higher poverty line of R322 a month (in 2000 prices), aggregate poverty declined by 3.5 percentage points, from 52.5% in 1995 to 49% in 2005, while at the lower poverty line of R174 (also in 2000 prices) the decline was from 31% to 24% (Bhorat et al., 2014:221).

The larger decline at the lower poverty line suggests that those in deeper poverty experienced a relatively larger improvement in their welfare over the period.

Evidence shows that the government has implemented redistributive policies and mechanisms which have expanded access to education for disadvantaged black people in some education sectors. However, such access has not created equal rights or conditions of fair equality of opportunity for all students in post-school education, as the government's budget for post-school education has favoured traditional students who study full-time at higher education institutions and TVET colleges.

However, funding aimed at giving disadvantaged black adults access to post-school education requires different considerations. As discussed earlier, research findings indicate an emerging correlation between declining household income and low levels of education among adult heads of households. Most disadvantaged black adults require household income to cover their financial responsibilities in respect of their families; and these financial commitments prevent them from pursuing post-school education studies. This creates the need to consider redistributive measures so as to enable access for disadvantaged black adults by recognising their equality and socio-economic rights to public funds that

will enable them to overcome their socio-economic barriers, and to realise fair equality of opportunity and equitable access to post-school education as a 'route out of poverty' and as a social justice benefit.

I take my cue from the successes of redistribution through social transfers in reducing poverty and argue that similar policies and mechanisms could facilitate further distributive justice and enable access to post-school education for disadvantaged black adults.

In the next section, I explore the possibilities of expanding the redistributive policy frameworks into the realm of post-school education, and propose that socio-economic rights to public funding for disadvantaged black adults may lead to access to post-school education.

Access to post-school education as a route out of poverty: Rethinking equity and social justice

Thus far, I have put forward a distributive theoretical perspective that is based on the conceptualisation of a contingent relationship between interrelated equality rights and socio-economic rights, principles of social and economic justice, and redistributive policies. Now I apply this perspective to framing the possibilities for disadvantaged black adults to access post-school education. I also point to some of the limitations.

'Social wage stipend', household income, 'a route out of poverty' and structural unemployment

I propose that a redistribution strategy be implemented. Through it, the government would provide social assistance to enable disadvantaged black adults to surmount the situational socio-economic barriers that deter access to post-school education. Such social assistance could be made available in the form of a 'social wage stipend', a term derived from the concept 'social wage'. The literature review of Frye et al. (2018) shows a 'social wage' to be a highly contested concept; for the purposes of this article, therefore, I rely on Aliber and O'Donovan's (2003:4) assertion that a social wage is 'the total value of in-kind benefits received by a person or household from the government'. This is more suited to the remedial measure I am proposing.

The potential beneficiaries of such stipends would be 'least-advantaged members of society', 'the worst-off', 'who experience extreme need', 'chronic poor', 'transient poor', 'vulnerable', 'unemployed', and 'precariously employed'. In addition to a full bursary for post-school education, a stipend should be considered as a supplement to household income. This proposal rests on two assumptions:

- That, for disadvantaged black adults, stipends could create household income that frees them from the daily grind of survivalist preoccupations that generate a meagre income to stave off hunger; and

- That, for 'precariously employed' disadvantaged black adults, stipends could create regular, albeit short-term, supplementary household income which would give them a chance to 'step out of the livelihood economy of subsistence' or 'temporary employment' in order to access post-school education opportunities.

To summarise: Earlier, I cited research showing that social grants have reduced poverty. Such policies and mechanisms in respect of social grants could be regarded as a precedent for exploring their applicability to using stipends as a strategy for redistribution, which Fredman (2007:215) states 'is concerned with injustices rooted in the economic structure of society'. This view is supported by Spreen and Vally (2006:357), who remind us that the Peoples Budget Campaign 'points out that, while the education budget is large, the redistributive thrust is limited'.

As a natural progression from this reasoning, the following critical question arises: 'What public funds could be made available for stipends?' At this time, the government provides bursaries or loans as income for students in post-school education institutions through the National Student Financial Aid Scheme (NSFAS). Through the National Skills Fund (NSF), the government also provides learnerships as income to enable adults and youths to gain a qualification. I suggest that a 'social wage stipend' should be considered similar to a 'stipend' that the NSF pays to learners who are registered for learnerships. It occurs to me that perhaps all post-school education opportunities for disadvantaged black adults should be considered in a similar way to the funding principles of a learnership model. A shift in this direction will require redistributive policies and mechanisms to be formulated that can coincide with the implementation of the White Paper on Post-School Education (DHET, 2013).

To reflect on these proposals, I next consider the two questions: 'Is it possible that a stipend as a form of distributive justice can provide access to post-school education?'; and 'What are the limitations of such a scheme?'

It is possible that such a stipend could augment household income to such an extent that it allows the beneficiaries to participate in post-school education studies. However, for a stipend to enable access to post-school education as a 'route out of poverty', it seems that a sequence of events must occur. It starts with the distribution of a stipend that reduces poverty in the short term. This is followed by the disadvantaged black adults gaining access to post-school education. Success in such post-school education may result in an individual gaining access to sustainable employment that provides a sustainable income, which, in turn, reduces poverty. These relationships are, however, tenuous. But if conditions are favourable and the sequence of events proceeds successfully, then post-school education can provide a 'route out of poverty' through the seminal event: the payment of a stipend.

The possibility of a successful outcome is linked to the realisation of socio-economic rights. Fredman (2011:585) recommends that the 'state … take reasonable measures within available

resources to realise the right progressively'. But, in my view, the slow progression of realising socio-economic rights presents a critical limitation. Dugard (2004:353) states that

> [p]overty and unemployment are the main problems facing South Africa. No constitution can provide a means for the improvement of the quality of life of our people. This explains why they should be in the forefront of constitutional litigation. If social and economic rights are justiciable, a court challenge, which interrogates the social and economic principles that underpin the government's budget, may expedite the realisation of such rights.

While making a case for a stipend, I am also sceptical about whether it will be sufficient. Instructive in this regard is Liebenberg and Goldblatt's (2007:361) warning about the limitations of social assistance:

> The grant system excludes many millions more very poor South Africans who do not fall into the aforementioned categories, but face endemic structural unemployment. They are thus not in a position to earn enough to escape poverty. Many of the individuals and families who live without grants are worse off than those who access grants and face dire poverty and even starvation.

Notwithstanding all the imponderables and limitations, based on theoretical debates and research evidence, I make the case that government should provide a stipend for disadvantaged black adults who have low levels of education and are experiencing declining income that may place them at risk of extreme poverty. This form of social assistance would provide household income that could go some way towards enabling access to post-school education as a 'route out of poverty' and as a social justice benefit.

Conclusions

In this article, I constructed a distributive justice perspective predicated on drawing relationships between interrelated equality rights and socio-economic rights, principles of social and economic justice, and redistributive policies. This perspective served to identify the possibility that social assistance can enable disadvantaged black adults to surmount their socio-economic barriers and access post-school education as 'a route out of poverty' and as 'a way of promoting equality of opportunity'; it would also be a means of realising 'equitable access' for the 'achievement of greater social justice'.

Probing this perspective, I drew attention to the possibility that redistribution through social assistance can promote access to post-school education as 'a route out of poverty' and as a social justice benefit. I also considered the limitations of such a scheme. Framing poverty as an individual concern poses some limitations for conceptualising post-school education as a 'route out of poverty'. Further theoretical perspectives must take into account structural poverty, as suggested by Fredman (2011:580), who reminds us: 'At the

other extreme, the structural approach recognises that poverty is based on forces beyond the control of any one individual.'

In my view, it is only when increased levels of education enable disadvantaged black adults to secure sustainable income generation that one can argue that post-school education provides a 'route out of poverty'. At the same time, I am aware that poverty is also structural and suggest that a stipend could alleviate individual poverty but be limited in reducing structural poverty.

Looming in the background is the question: 'Can stipends reduce racially defined, status-based income inequality?' The statistics show that the overwhelming majority of poor people are black. Government social grants paid to black people increase their income and have the potential to reduce income inequality both between black and white people and among black people. It is, however, the case that, if income for the lower quintiles, through social assistance, increases slightly and income for the higher quintiles increases substantially, inequality will increase. In this regard, Fredman's (2011:575) assertion is illuminating:

> [M]easures directly addressing poverty might tackle some of the main causes of status disadvantage. For example, minimum wage legislation, which directly addresses socio-economic disadvantage, has made a significant contribution to narrowing the gender pay gap in the UK.

From this, a further question arises: 'If a stipend is set at a minimum wage level, can it enable post-school education as a vehicle that addresses racially defined, status-based income inequality?'

Further theoretical perspectives on distributive justice must take into account Liebenberg and Goldblatt's (2007:342) assertion that 'substantive equality thus requires a dismantling of structural inequality and necessarily focuses on patterns of group-based disadvantage'. Theoretical assertions by Dugard (2004), Liebenberg and Goldblatt (2007) and Fredman (2011) converge with the currently emerging debates about addressing structural inequality in South Africa. The theoretical perspectives that emerge from these debates will present opportunities to reconsider a distributive justice that includes the contribution of post-school education to reducing inequality in the country.

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Embodied learning through mindfulness: Encouraging a holistic approach to adult learning

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ABSTRACT

Adult education and learning is a field of study devoted to transformation, both for the individual and for society at large. The academic literature related to adult education and learning reveals the dominance of a cognitive, rational approach to how learning takes place in Western culture. A holistic approach to adult learning, which includes the body and emotions, is often marginalised despite there being growing support for inclusion of the latter. This article reports on a research study that examined learning during a mindfulness-based stress reduction (MBSR) programme for adults offered in Cape Town, South Africa. Semi-structured interviews were used to collect the data and they were analysed using transformative learning theory. It was found that mindfulness inspires embodied learning, which creates a new awareness of the body and emotions. The data showed that embodied learning often motivated new actions among adult learners, indicating transformation. The findings suggest that embodied learning through mindfulness should be included in adult learning settings to complement rational, cognitive knowledge. This article proposes that embodied learning should be more prominent in theory-building related to adult education and learning. This will promote a more holistic approach to adult education and learning.

KEYWORDS

embodied learning; mindfulness; transformative learning; adult education and learning

Introduction

Adult education and learning is a field of study devoted to transformation, both for the individual and for society at large. Social justice is a prominent theme in adult education and learning and the academic literature reveals that social justice in adult education addresses questions such as: 'What growth?; Access for whom?; and Access to what?' (Boyadjieva & Ilieva-Trichkova, 2017:100). To answer these questions, authors compare factors such as education level, occupation status, gender and age to measure access to adult education settings (Boyadjieva & Ilieva-Trichkova, 2017). Boeren, Nicaise and Baert (2010:57) expand this view to include sociocultural and psychological factors such as attitudes, confidence and motives. They refer to these sociocultural and psychological factors as factors that influence social justice in adult education and learning.

Supporting this perspective, John (2016) illustrates how emotions such as trauma and fear can impede the learning process. This can be interpreted as a barrier to learning, particularly in an African context, and highlights the need to include emotions in adult education and learning settings, which this article aims to advance with the examination of embodied learning through mindfulness. Furthermore, it aims to expand the view of equity, fairness and social justice in adult education by proposing that there is an inequity in how learners are being taught in adult education and learning settings, an inequity which needs to be examined. In these settings, the focus is often on activities of the mind rather than those of the body and emotions, resulting in an imbalanced and narrow approach to adult education and learning. This prominence of the mind over the body indicates a Western perspective of the process of learning and marginalises other approaches to learning, such as embodied learning.

This article sets out to show that a more holistic approach to adult education and learning, which includes both the body and the mind, is necessary to promote a more inclusive approach to adult education and learning. Qualitative data were collected through semi-structured interviews and transformative learning theory was used to analyse and theorise the data.

Literature review

Mindfulness

The concept of mindfulness and the MBSR programme were introduced to, and made popular in, Western society by Jon Kabat-Zinn in 1979 (Kabat-Zinn, 2013). Kabat-Zinn (2013:xxxv) defines mindfulness as 'the awareness that arises by paying attention on purpose, in the present moment, and non-judgementally'. Mindfulness can be a difficult concept to grasp, but, essentially, it may be described as a particular way of paying attention, without judgement, to what is arising in both the mind and the body at a given moment. It is examining oneself in the spirit of enquiry and understanding (Newman, 2008).

Kabat-Zinn (2013) confirms that, when fostering mindfulness, a learner is encouraged to observe their own experience, including their thoughts and emotions. Usually, meditation and yoga practices are used to foster mindfulness and, fundamentally, mindfulness is based on Buddhist principles. Unfortunately, according to Kabat-Zinn (2011), the Buddhist origin of these practices alienated many people in Western society; therefore the secular identity of mindfulness as taught during the MBSR programme was intentionally developed to ensure its appeal to people from a variety of cultural and religious contexts.

However, removing mindfulness from its cultural context has been criticised in the academic literature. One of these criticisms of mindfulness is that, in Western culture, cognitive knowledge is emphasised, whereas mindfulness as propagated by Kabat-Zinn comes from a culture where subjective experience is regarded as a source of knowledge (Chiesa, 2013). Panaïoti (2015) concurs with this view and postulates that, although mindfulness is a valuable practice for modern society, strong Western ideological roots have a propensity to disregard alternative types of knowledge. Rapgay and Bystrisky (2009:150) validate this view by stating: 'In the field of research [into] mindfulness, there is an increasing attempt to modify the concept of mindfulness to configure with cognitive theories and models.'

Since the introduction of mindfulness to Western society, it has inspired hundreds of research papers and more than a thousand books (Kabat-Zinn, 2011; 2013). Kabat-Zinn (2013) notes that there were 1 500 books about mindfulness in 2013, and that this number was growing. Furthermore, the literature review also revealed that research focused on mindfulness is mostly quantitative in nature, with very few qualitative studies to be found. Kerrigan et al. (2011) report similar findings. Therefore, the present study, with its qualitative focus, generates the type of knowledge that is uncommon in academic papers focused on mindfulness.

In addition, although mindfulness is a widely researched concept, the literature review showed that mindfulness is generally not explored and analysed in terms of adult education and learning. Only a few studies consider mindfulness in education; these include Hyland (2009), who investigates the 'therapeutic turn' in adult learning, while Orr (2002), Berila (2014), and Wagner and Shahjahan (2015) explore mindfulness through the theoretical lens of critical pedagogy. Others, such as Shapiro, Brown and Astin (2011), illustrate the potential for mindfulness to inform transformative learning theory. The literature review showed that, although there has been some exploration of mindfulness in education, the academic literature is very limited and points to the need for further research and theory-building.

In support of theory-building focused on mindfulness in adult education and learning, the study that this article is based on explored mindfulness in terms of transformative learning theory, as suggested by Shapiro et al. (2011). The academic literature, as referred to in this section, indicated clearly that observation and awareness of experience is central to mindfulness and also prominent in transformative learning theory. Consequently, mindfulness has the potential to inform transformative learning theory.

Mindfulness and transformative learning theory

At present, there are many approaches to, and theories on, adult education and learning. One of the prominent theories on adult education and learning is the theory of transformative learning as developed by Mezirow (1981). Since its formulation, as highlighted in the academic literature, the theory has inspired numerous research articles that further explore and analyse the theoretical assumptions related to this approach to adult education and learning.

In transformative learning theory, Mezirow (1994:222–223) defines learning as 'the social process of construing and appropriating new or revised interpretation of the meaning of one's experience as a guide to action'. The premise of the theory is that it is the experience of the adult learner that becomes the foundation for cognitive processes of reflection and transformative learning, which will then inspire new actions, thus indicating transformation (Mezirow, 1993; 1995). Mezirow (1981:7) believes that adults have a natural predisposition to proceed to new perspectives, judged to be a 'quest for meaning', which he likens to the learning process. Mezirow acknowledges the influence of emotions, but the primary focus of the learning process is on cognitive, rational processes of reflection (Mezirow, 2000; Taylor, 2000; Ntseane, 2011).

Meaning is considered an interpretation of experience, and, to shape meaning, Mezirow (1991) considers that meaning schemes and meaning perspectives are engaged. 'Perspective transformation' refers to the manner in which these meaning schemes and perspectives are adjusted and changed. 'Meaning schemes' signifies specific beliefs, value judgements, knowledge and emotions that regulate the way in which individuals interpret specific experiences and their behaviour and opinions. Meaning schemes are modified regularly and, combined, they form meaning perspectives that represent an individual's beliefs, theories, viewpoints and evaluations. Meaning perspectives can be equated to habitual expectations, inspired by beliefs, assumptions, cultural and social norms as well as ideologies; they are used to control what is observed, comprehended and memorised (Mezirow, 1991; Taylor, 1998). Meaning perspectives are employed to organise, interpret and give meaning to an experience. If an experience is integrated into the perspective, it strengthens the perspective or slightly alters it should there be some discrepancy from preceding experiences. If an experience cannot be integrated into the meaning perspective, it is either rejected or it transforms the meaning perspective to include the new experience (Taylor, 1998).

Awareness of the experience of the body and emotions as encouraged through mindfulness training and the MBSR programme can be useful when exploring transformative learning theory and the transformation of meaning perspectives. Scholars such as Orr (2002) remark that intellectual insight alone is not enough to break the attachment to previous meaning perspectives, but experiential awareness of false assumptions and views creates the opportunity for transformation. Duerr, Zajonc and Dana (2003) support the view that transformation that is pursued through cognitive methods alone will not result in a deep level of transformation. In addition, they reason that transformative learning is too focused on rational thought. Awareness of the body and emotions through mindfulness training creates

the aperture to address this critique, and Orr (2002) asserts that cultivating mindfulness can encourage this experiential awareness.

The academic literature calls for a more holistic approach to transformative learning theory to be explored further. For instance, Taylor (2001:220) states that 'much more attention needs to be given to the emotional nature of transformative learning' and asserts that emotions are a prerequisite for rationality to occur. The present study responds to this call and sets out to expand further the scope of transformative learning theory to include other forms of knowing by promoting an awareness of experience. Furthermore, the study explores whether mindfulness promotes conditions that can aid in transformative learning through embodied learning.

Mindfulness and embodied learning

It is evident from both the academic literature and the MBSR programme curriculum that, during mindfulness training, much of the focus is on fostering a new awareness of the body and emotions (Kabat-Zinn, 2011). Cebolla et al. (2016) confirm that body awareness is central to mindfulness, but is also central to embodied learning. Embodied learning is described by Merriam, Caffarella and Baumgartner (2007:190) as 'learning through the body'. Others, such as Freiler (2008:40), assert that 'embodied learning involves being attentive to the body and its experiences as a way of knowing'. Emotions are included in embodied learning and, according to Merriam et al. (2007:195), 'emotions are embodied and thus are an integral component of this type of learning'. Since the academic literature shows that both mindfulness and embodied learning focus on an awareness of the body and emotions, it is concluded that these types of learning are closely associated.

The current debates in the academic literature on adult education and transformative learning theory reveal that, although alternative perspectives are present in the literature, a more holistic approach to adult education and learning continues to be marginalised. Embodied learning is often absent from adult education and learning, and embodied experience is frequently ignored. Merriam et al (2007) confirm that, in Western society, adult education and learning focus on cognitive processes. However, feminist and anti-racist theorists such as Michelson (1996; 1998) explore the domination of cognitive processes in learning. Michelson (1996; 1998), for instance, examines learning through the body and suggests that the moment of learning is located in the bodily and emotional experience, not in the cognitive processes pertaining to experience, which is often reflected in adult education and learning theories. This focus on cognitive processes of learning is regrettable in a field of practice focused on fairness, equity and social justice – in particular because authors such as Orr (2002), Wagner and Shahjahan (2015), and Channon, Matthews and Khomutova (2018) posit that embodied learning can empower people and challenge dominant ideological beliefs pertaining to learning.

In the light of the views expressed by these authors, it can be argued that a Western perspective on learning has oppressed the body and emotions, prompting an inequality in how learning takes place in adult education and learning settings. This is also evident in the theoretical

framework based on transformative learning theory. In transformative learning theory, the emphasis is mostly on reflection and rational reasoning that will inspire new actions, revealing a Western perspective on learning. Yet, embodied learning is re-emerging in adult education and learning. Scholars such as Clark (2001), Amann (2003), Cohen (2003), Dirkx (2008), Shahjahan (2015), Wagner and Shahjahan (2015), and Channon et al. (2018) acknowledge the connection between the body and learning.

Taylor (2001; 2008) and Dirkx (2008) propose that a holistic approach to education should include emotions in learning and represent ways of knowing that can challenge the dominance of reason as represented in a Western perspective on learning. Similarly, Clark (2001) mentions that embodiment is the most complete way to engage people in the learning experience, but that recognising the body as a source of knowledge is not in line with the Western approach to education. This acknowledgement in the academic literature of the need to challenge Western perspectives on learning indicates a need for theoretical work and the creation of new knowledge, with which the present article converges. In addition, including embodied learning through mindfulness in transformative learning theory has the potential to constitute a more holistic approach to adult education and learning.

Research design and methods

Research site: A South African mindfulness-based stress-reduction programme

The eight-week MBSR programme was an appropriate research site for a study focused on mindfulness in adult education and learning because, according to Kabat-Zinn (2011), the MBSR programme was developed as an educational programme. Its educational orientation and the adult participants support the view that the MBSR programme can be included in the field of adult education and learning. Furthermore, it has a curriculum and specialised content focused on cultivating mindfulness, which further supports this perspective.

At the time when the data for this study were collected, MBSR was the only mindfulness-based programme to be offered regularly in South Africa. The participants in the study were recruited from Cape Town and surrounding areas because there were more facilitators in this area at the time. This meant that more MBSR programmes were being offered and, as a result, more potential participants were available for the study. After permission was given by the chairperson of the Institute for Mindfulness South Africa (IMISA), the four facilitators who were based in Cape Town at the time were approached for permission to collect data from the groups that they were facilitating. Three facilitators gave their consent, while one facilitator refused.

The participants

Data were collected from 30 adult learners who voluntarily participated in a semi-structured interview process. The participants were presented with an information sheet about the research study and asked to sign a consent form prior to participation. Pseudonyms were used to ensure

the anonymity of the participants. A limitation of this study was that adult learners were educated and middle-class, which limited the potential of this study to be applicable to the wider field of adult education and learning in a South African context. This is partly because many adult learners could not afford to participate in the MBSR programme, as the programme fees varied between R4 000 and R5 600. At present, MBSR is a private adult education programme managed by the individual facilitators. No bursaries were available at the time that the research was conducted. Another limitation of this study was the fact that the majority of the participants were white, with only two Asian participants. There were no black participants. Therefore, the adult learners on the programme were not a representative example of wider South African society.

Methods and methodology

Pre- and post-course questionnaires were distributed to the participants in order to collect their demographic details and enable purposive sampling in respect of the interviews. Fifty-five participants completed the pre-course questionnaires, but only 49 completed the post-course questionnaire. Only participants who completed both the pre-course and post-course questionnaires and indicated that they had completed six out of the eight weekly sessions were considered for an interview. A qualitative approach was used to collect the data which provided the basis for the findings in this article, because (as highlighted in the literature review) there is a need, in the academic literature related to mindfulness, for more qualitative data about mindfulness.

Semi-structured interviews were used to collect the data. A semi-structured interview schedule was developed, guided by a thorough literature review, the theoretical framework, and a review of interview schedules used in previous studies on mindfulness, such as those of Hunter and McCormick (2008) and Duerr (2004), who also used semi-structured interviews to collect data for studies focused on mindfulness. All the interviews were digitally recorded and transcribed for analysis. A substantial amount of data was collected; consequently, an analysis method that could incorporate this was required. A thematic analysis was identified as suitable for working with such large sets of data. The analytic process involved the identification of themes, which were then employed to theorise the data in terms of mindfulness in relation to embodied learning and transformative learning theory.

Findings and discussion

Embodied learning: The body

The findings revealed that 15 adult learners were not aware of their bodies prior to mindfulness training, and eight became more aware of their bodies during mindfulness training. This lack of awareness suggests that adult learners either did not notice the body before attending the MBSR programme or did not deem it important to pay attention to their bodies. This confirms the view of authors such as Kabat-Zinn (2011) and Freiler (2008:38), who assert that 'most

humans, in general, have become inattentive to the potentiality of learning through the body'. One of the participants, Werner, echoed this statement, saying:

> What I did find is that we are so conditioned not to pay attention to our bodies, but when I do a meditation I become more aware, physically, of strains on my body. I realised I don't pay enough attention to my body. I learned to pay attention to my body.

By recognising 'that we are so conditioned not to pay attention to our bodies', it seems that Werner, albeit unconsciously, identified a meaning perspective as described by Mezirow (1991) which controlled what he perceived, understood and remembered. Rochelle was another participant who was oblivious of her body before the MBSR programme. She described the process of attending to the body through mindfulness as 'coming back to my body', stating:

> For me (pause) what I took from the eight weeks and that I keep bringing into my life and reminding myself of in my day-to-day moments, was definitely the sense of coming back to my body.

Other participants, such as Garth and Michaela, did not provide detailed accounts of their newfound body awareness. Garth simply commented:

> I would say I am more aware of my body.

Michaela noticed:

> There was this massive shift back to the body.

Yet, other participants also experienced an awareness of bodily pain, which created a sense of concern that they were not focused on what their bodies were communicating. Sharon, for instance, was so disconnected from her body that she did not even realise that she experienced pain. This is what she said:

> During the body scan I realised that I have lower back pain. I never noticed it before.

Ciska had a similar experience:

> I realised that my body hurt a lot. I realised that after the first session. I became aware of the pain.

Unlike these two participants, who realised that they had been ignorant of their body prior to the MBSR programme, Nadia thought she had always been aware of her body. Yet, during the MBSR programme, she learnt what body awareness really entails. In her words:

> I was not very aware of my body before. After mindfulness I just realised I thought I was in touch with my body but I wasn't at all.

These extracts indicate embodied learning through mindfulness. They further show that knowledge is available through the body, and that, as Norris (2001) proposes, is in itself valuable. It suggests that it is not necessary to subject this kind of knowledge to cognitive processes for it to be deemed knowledge. Yet, cognitive processes of reflection and new actions are central to transformative learning theory as developed by Mezirow (1981; 1995; 1998). Consequently, it was important to explore how embodied learning and a new awareness of the body, as described in this section, triggered reflection and new actions.

Embodied learning: Reflection on the body

The findings revealed evidence that embodied learning through mindfulness, and more specifically a new awareness of the body, had the potential to initiate cognitive processes of reflection. Fifteen adult learners, for instance Ida, recognised that there was a connection between the body and the mind. She observed:

> Whatever takes place in your body. You must look at that. There is a mind–body connection.

Lydia made a similar remark:

> I realised you have to be very conscious of what is happening in your body. And through awareness, you will have physical symptoms, which will trigger this conversation within you.

Michaela related:

> [W]hat started to grow within me is to see and to start feeling what I am feeling in my own body. And to pause then and to figure [it] out.

The statements above indicate that embodied learning through mindfulness has the potential to encourage a new awareness of the body and to inspire cognitive processes of reflection. Yet, Mezirow (1993:146) argues that transformative learning is fully realised only when there is evidence of new actions that emanate from learning. There was in fact evidence of new actions that were related to reflection on embodied learning, particularly when adult learners became aware of pain. Monique, for instance, became aware of pain in her back and said this about it:

> I realised how skew I hold myself and how much less pain I will have in my back if I just think about it and adjust my posture. That was quite useful. You just learn to ground yourself and that was quite amazing to me that I could get

> rid of my back pain by just noticing that I was holding myself very strangely. I was always vaguely aware of my back pain but I didn't do anything about it.

In this extract, Monique describes how, prior to the MBSR programme, she was holding herself in a way that caused her pain without even realising it. Learning to be aware of the physical body and its experiences stimulated a process of reflection pertaining to the pain. Once she determined the reason for the pain, she was able to adjust her posture, indicating that she took action to ease the pain.

Willem's experience was similar to Monique's. He said:

> I realised that because of the way I sit at work my back is in spasm all the time. And just by doing that little bit of yoga I realised in what a terrible state my body is. At work I actually got a new chair so that I don't sit that way anymore and now my back feels better. So I actually started listening to my body. I actually knew that my back has been aching for a long time but I just didn't do anything about it, but this course made me aware of it and your body also tells you when something isn't right.

Both Willem and Monique indicated a new awareness of pain, and responded to it differently as a result of this new awareness. They cognitively explored the experience, which suggests that they then reflected on it. They identified a suitable action related to the experience of pain, which therefore implies new action related to embodied learning through mindfulness. In other words, these adult learners were aware of, and considered, the needs of the body, which ultimately guided their ensuing actions.

Other adult learners, such as Gerard, also recognised, for the first time, that they had to consider the needs of the body. Gerard explained:

> So this course came at the right time. I am more aware of my health, I am more aware of my body and I am more aware that I should take things easy. But not bring everything to a grinding halt. I just have to take care of myself.

Gerard realised, as a result of embodied learning through mindfulness, that he should change his actions and take better care of himself. Like the others, he learnt that it is important to pay attention to the body and its needs, or to consider the body, and that it is a source of knowledge that can provide him with valuable information about himself which could then guide his actions. The evidence indicates that it was embodied learning, rather than cognitive learning, that inspired new actions. However, it is important to note that embodied learning was not limited to awareness of physical sensations in the body, but that a new awareness of the body also sparked a new awareness of emotions for adult learners who participated in the study.

Embodied learning: Emotions

An awareness of emotions is considered a component of embodied learning in the academic literature, as Clark (2001) and Merriam et al. (2007) confirm. The findings brought to light many similar examples of how adult learners on the MBSR programme learnt to be aware of the experience of their bodies, or, in other words, embodied learning through mindfulness, and as such realised that they were experiencing stress, anger or other emotions. The evidence indicated that 22 adult learners then connected bodily sensations to their emotions, thereby learning about themselves, because previously they were unaware of these emotions. For instance, Benjamin became aware that he experienced stress and anxiety in his shoulders. This is what he pointed out:

> Well, I feel it in my shoulders when I get anxious or stressed. So I find I can then consciously relax it.

The data from the above extract show that mindfulness training enabled an adult learner to identify his embodied emotions. Other adult learners also noticed that they could feel emotions such as stress and anxiety in their bodies, yet they did not feel it specifically in their shoulders. Lizelle, for instance, felt anxiety in her stomach. She commented:

> I am a bit more aware of how emotions manifest in my body … for example, anxiety I can feel in my stomach.

Kerisha associated feeling stressed with heart palpitations, stating:

> Like physiological [indications,] you can feel stress coming. I found myself quite stressed and experiencing heart palpitations.

Like Kerisha, Lydia linked emotions to the body, saying:

> When I get into a heightened emotional state, I can see what is happening with the sensations in my body.

Nadia also observed a physical reaction to her emotions. She realised that she was not only not particularly aware of her emotions before starting the MBSR programme, but that she was also ignoring her body and her emotions. She explained it in this way:

> I realised that I am not in touch with my body. I will experience frustration and I will just tell myself to get over it. That body scan was a reality check and I realised I wasn't in touch with my body. What I also learned is that I do not allow myself to experience pain, not physically or emotionally.

This extract from the interview testifies to Nadia's acknowledgement that she used to ignore her body and emotions, especially when she was experiencing pain. Mindfulness

training prompted embodied learning and Nadia then realised that simply ignoring the body was not beneficial and that it was time to become more aware of the experience of the body and of the knowledge that is located in the body. Nadia was not the only adult learner who ignored her body and her emotions prior to the MBSR programme. Marli made a similar statement and related that she had learnt to be aware of the experience of the physical body as well as of embodied emotions. In her words:

> And you can't ignore it anymore because I could feel it in my body as well[;] and that is why mindfulness is important because you cannot just deal with stress cognitively. I embody my stress so I have to deal with the body.

In the above testimonies, the adult learners described how they learnt to recognise the physical effect of emotions in the body, which indicates embodied learning through mindfulness. There were also adult learners who referred to a new awareness of their emotions that they had not previously recognised, although they did not necessarily refer to the physical sensations associated with the emotion. For instance, Julia commented:

> In general I noticed more negative emotions but sometimes there were positive emotions. It helped me to see there can be positive emotions. Not everything is bad. There can be good things as well.

Like Julia, Ella did notice positive new feelings as a result of mindfulness; but, for her, it was mostly a matter of recognising unpleasant emotions. She described it in this way:

> I would say negative emotions like anxiety and guilt. There were also positive things like feeling a sense of empowerment. Not sure if that is an emotion. Calmness at certain points but noticing the dominant unhealthy emotions.

The findings confirmed the perspective of Clark (2001) and Merriam et al. (2007) that, during embodied learning, emotions are often central. The findings also indicated that embodied learning through mindfulness can be central to transformative learning theory, as it can be the basis for reflection, which may trigger perspective transformation. They also confirm the view of Mälkki (2010) that emotions indicate assumptions that require reflection, which will be referred to in the discussion of emotional reflection in embodied learning.

Embodied learning: Reflection on emotions

The findings of the study showed that embodied learning, although in itself significant, often triggered cognitive reflection. Mezirow (1981; 1995; 1998) refers to the cognitive processes of reflection as pivotal to the process of learning. Therefore, it had to be considered how embodied learning and a new awareness of emotions influenced the cognitive processes of knowledge construction and how it may have inspired new actions.

Eighteen adult learners described how embodied learning through mindfulness triggered reflection – including Julia, who referred to herself as anxious. She noted:

> I found it helpful in terms of my anxiety. I am definitely (pause) it has helped it. Whereas before I would get myself worked up into a flurry of panic, I will still worry about things but you know I am sort of (pause) or I manage to be more calm and rational [about] worries. I will ask the question[s]: Why am I feeling this way? What am I so worried about?

In this extract, Julia describes how she engaged cognitively with her emotions through a process of reflection. Once she was aware of anxiety, she questioned the reason for the anxiety, creating the possibility of additional new knowledge about the emotion. She recognised that she had to stay aware of her emotions and deliberately engage with emotions in a different way than before the MBSR programme, which seemed to have benefitted her. She explained:

> I can now get myself sort of out of it whereas before I would harp on the emotion and fall into a depressed or demotivated state. Now I will get angry or irritated but it will last for maybe a day or two and then I will get over it, whereas before it would last much longer and I would hold on to it without letting go.

Julia admitted that she used to stay angry or irritated for days on end. However, it seemed that a new consciousness of emotions and the reflection that followed helped her to let go of these emotions.

Marli was another adult learner who illustrated in detail the process of embodied learning and reflection on it. She worked at a well-known university, where she was in charge of the debt-collecting department, a position that caused her considerable stress. She gave a detailed description of the new way that she worked with embodied emotions and how this had changed her:

> I found that initially it wasn't such a pleasant experience but later on I could feel, okay, here I feel my stress, and just be curious about that and what can I do about it. So, ja, it definitely helped with the stress. I got more in touch with my body and my breath and what I did was, if parents came to me, they would schedule a meeting, like every half an hour, especially during registration time. So it was hectic. And then I would, before they walk into my office, I would take a breath. Just that type of thing to make sure that I will be present in a way. And when they are talking to me, listening to what they say. Not thinking I can't help you, I can't help you. So this is how the mindfulness has helped me with my stress. And I found that helped me to get through the day in those stressful times.

Although Sharon did not refer to anxiety or stress in the same way as Julia and Marli, she also described how mindfulness enabled her to identify her emotions and then further explore the reasons for the emotion through reflection. Or, in Sharon's words:

> Just kind of finding out what is going on.

She elaborated:

> So I kind of, when I am angry at a friend I say to myself, okay, am I judging that person? And if so, why? Does it relate to the past? What is happening? And then I am able to say okay and it really does help me. I am a very impulsive person so it helps me to almost … not to be so impulsive.

Sharon clearly described the process of reflection on emotions that helped her to create additional new knowledge. She reflected on the source of an emotion, questioning and considering her own response, which helped her to gain understanding. It appeared that this new understanding also helped Sharon not to act so impulsively, indicating new actions. Sharon was not the only participant who acted differently towards others. Christine also noticed that she was acting differently towards her children and her husband. She stated:

> I don't raise my voice to my children nearly as much as I used to, only occasionally. I haven't had a rip-roaring fight with my husband in at least a few months.

She elaborated:

> Being able to feel emotions and not kind [of] draw away from them and discovering that they are less overwhelming that way. With mindfulness I worked with emotion and I can see that there is always something behind the emotion that you need to deal with.

Christine's realisations lead one to conclude that, as a result of embodied learning through mindfulness, she was able to feel her emotions. When she was able to stay with the awareness of the emotion, she realised that she had to engage cognitively with the emotion in order to work with the reasons for the emotion. She noted that 'there is always something behind the emotion that you need to deal with', suggesting that she was now dealing with whatever reason was causing the emotion, whereas previously she did not. Engaging with her emotions in this way changed the way she acted towards her children and husband.

The adult learners clearly demonstrated that there is a relationship between embodied learning through mindfulness and cognitive processes of reflection that can inform transformative learning theory. Adult learners often reflected on embodied learning, especially on a new awareness of emotions, as they wanted to understand emotional experiences. Embodied learning therefore created new knowledge, which then prompted reflection and consequently created additional new knowledge and resulted in new actions.

In transformative learning theory, awareness is considered as the first step towards transformation, but Mezirow (1995) does not consider the new awareness of experience, as illustrated by embodied learning through mindfulness, to be learning. According to transformative learning theory, the moment of learning is located in cognitive processes of reflection, while new awareness of the body and embodied emotions is not considered learning. Mälkki (2010) highlights the role of emotions so as to indicate assumptions that require reflection, but the new awareness of emotions in itself is not considered learning. The data gathered in this study support the perspective that emotions can trigger cognitive reflection and learning, but they also show that a new awareness of the body and emotions, in itself, is significant and can be considered to be learning.

By including embodied learning in the process of transformative learning, a more holistic approach to transformation becomes possible. Some scholars, such as Amann (2003) and Cohen (2003), advocate the inclusion of the body in transformative learning, but the body in relation to transformative learning theory remains largely unacknowledged and under-investigated. Dirkx (2008) and Taylor (2001) propose that emotions should be included in a more holistic approach to education, but they do not recognise the role of the body. The present study of the role of mindfulness in the process of learning provided evidence that a holistic educational approach, aimed at transformation, should include both the body and the emotions in the process of learning, and that mindfulness can support such an approach.

Conclusion

The findings of this study highlight the fact that the adult learners were in the habit of ignoring both their bodies and their emotions, signifying a shared-meaning perspective. This suggests that the experience of the body is not a site for learning and knowledge creation. This meaning perspective is typical in a Western society and indicates a Western perspective on learning. Mezirow (1991) claims that meaning perspectives will often result in experiences that do not correspond to the habitual belief being disregarded. The findings illustrate that the adult learners were in the habit of taking no notice of their bodies and their embodied emotions. However, embodied learning through mindfulness changed this habit, indicating the potential to transform a meaning perspective. These findings, therefore, support the academic literature which proposes the theoretical notion that learning should include both the body and embodied emotions.

It was found that other forms of learning, such as embodied learning through mindfulness, should be included in adult learning settings to complement rational, cognitive knowledge. For instance, mindfulness should be introduced in teaching and training programmes for adult educators at South African universities. Currently, the University of Cape Town has introduced mindfulness in its MBA programme, while Stellenbosch University also offers a postgraduate certificate in mindfulness aimed at developing facilitators who can offer the MBSR programme. However, these programmes reach a limited number of students and

more programmes, such as the MBSR programme, should be offered at universities and other further education and training institutions throughout South Africa.

Encouraging mindfulness in adult training and education settings will make embodied learning through mindfulness more accessible to the broader South African society. Authors such as John (2016) highlight the emotional barriers to learning in South Africa, barriers that are rooted in difficult emotions. As illustrated in the findings, embodied learning through mindfulness creates the aperture through which to address difficult emotions and, consequently, it has the potential to moderate emotional barriers to learning. However, further research aimed at exploring the potential of embodied learning through mindfulness to address emotional barriers to learning is required, particularly in an African context.

In conclusion, this study supports the view of authors such as Orr (2002), Dirkx (2012) and John (2016), who call for a more holistic approach to adult learning. Furthermore, it alludes to what Wagner and Shahjahan (2015:246) describe as a need to challenge 'the underlying epistemological foundation of the educational system', which is based on the mind dominating the body. Although there is some evidence of current debates on embodied learning in the academic literature, very little evidence exists of practical suggestions as to how to introduce embodied learning in the adult education and learning environment. Berila (2014) and Wagner and Shahjahan (2015) state that mindfulness represents a way of introducing embodied learning into adult education and learning settings, and the present study supports this view. Furthermore, it confirms the argument that, through mindfulness, embodied learning can be introduced in an adult education and learning environment in order to create the opportunity for a more inclusive approach aimed at transformation for both the individual and society at large.

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Language in a Life Orientation class: Complexities and contradictions

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ABSTRACT

The impact of English as a language of teaching and learning on student access and success at universities in South Africa is well documented. So, too, are the enablements of multilingual strategies and the use of indigenous languages as languages of learning and teaching. The nature of TVET (technical and vocational education and training) student experiences of language is, however, under-researched; hence this article reports on a case study that casts light on such experiences. The case study examined perceptions of student English-language proficiency and the impact of English on student participation and success in Life Orientation, a subject seeking to enhance student academic and life success and resilience. The study found a complex language situation, with poor student performance and English identified as a major barrier. The students did not have English as their mother tongue and rarely spoke it at home, but believed themselves to be proficient in it. Lecturer perceptions of student English-language competence differed markedly from those of the students but also showed contradictory perceptions of student language performance. The students' blind spot about their competencies militated against their success. The study recommends that rethinking equity and social justice in post-school education should include thinking towards more inclusive language policies that better serve a complex multilingual context.

KEYWORDS

English as language of teaching and learning; TVET; Life Orientation; multilingualism; translanguaging; mother-tongue instruction

Introduction

This article is based on a case study that explored lived experiences of language, or language being, in a Life Orientation (LO) class at a technical and vocational education and training (TVET) college. It examined the language of teaching and learning and its influence on student success in LO, exploring the role of language in enhancing the equity of outcomes and social justice. Language is an ongoing challenge in a post-school educational context concerned with student epistemic access. The 2015 and 2016 #FeesMustFall student protests called for higher education institutions to interrogate and decentre their north-looking knowledge, including the hegemonic languages of teaching and learning. English remains privileged in the higher education landscape in South Africa, and can be a barrier to access and success. Indigenous languages as language of teaching and learning are largely erased from this landscape – this despite a plethora of research showing the cognitive advantages of mother-tongue instruction, a language policy (DHET, 2002) promoting the use and intellectualisation of indigenous languages as well as the use of multilingual strategies in higher education. A report on the use of African languages as media of instruction in higher education (DHET, 2015) found that, despite the language policy in higher education, English and Afrikaans still predominate as the languages of teaching and learning. Furthermore, the South African Human Rights Commission report (SAHRC, 2016) recommended that higher education institutions review their language policies so as to ascertain whether they are appropriate and practical, and also how they influence institutional culture. A draft revised language policy (DHET, 2018) urged higher education institutions to revise their language policies and attempted to help with this revision through funding models and implementation mechanisms.

The academic outcomes of students who learn through the medium of English but speak it as an additional language are poor (Heugh, Siegruhn & Pluddemann, 1995; Alexander, 2002; Alexander, 2013; Batyi, 2015), and so they contribute to a range of factors that result in systemic educational inequalities.

As cognition best occurs in one's mother tongue, Alexander (2002) and Kaschula (2013) argue for the development of indigenous languages as languages of teaching and learning in higher education. A rethinking of linguistic equity and social justice in post-school education would flow from a critical examination of what is regarded as literacy (especially the reading and writing practices in higher education and the languages in which these occur) and also whose literacy is dominant and whose is marginalised (Street, 2003). Alexander (2002) argues that the development of indigenous languages needs to occur alongside English so as not to deny students workplace and other opportunities. Janks (2009:11) also cautions that access to English in South Africa should be 'tempered by respect for, and maintenance of, students' African languages'. Furthermore, Hibbert & Van der Walt (2014:207) outline a number of multilingual teaching and learning practices by a 'new generation of academics', experimenting with multilingualism strategically to enhance student understanding and academic performance.

Context and rationale

The context for this study is a TVET college in the Eastern Cape. Like other TVET colleges, it performs a vital role for both the private and the public good – giving students the necessary vocational skills to find jobs for private good but also to contribute meaningfully to a post-colonial society for the public good.

Despite these good intentions, concern about the status of TVET colleges is ongoing; accordingly, the general public may continue to view these skills-based colleges as deficient. Furthermore, these students may be particularly at risk of not achieving success, given the nature of their educational backgrounds. This study focuses specifically on Level 2 (first-year) Life Orientation (LO) students in order to consider the effect English has, as the language of teaching and learning, on the academic performance of these students. The term 'language of teaching and learning' will be used in this article in the sense used in the 2018 Draft Language Policy for Higher Education as the language 'used to teach and learn at an educational institution' (DHET, 2018:7). It is a more nuanced and inclusive term because it includes student cognitive processes of acquisition and learning.

LO has come under scrutiny regarding its usefulness and its cognitive value. This article, however, argues that LO is a valuable subject for students at colleges and one that equips them with knowledge to succeed at their studies and in society at large. It should enhance the possibilities of students achieving success in their vocational studies as well as in life (DHET, 2013). LO is a holistic combination of life skills, information and communication technology that cover topics such as personal and career development, health and well-being, citizenship, learning skills, cognitive skills, social and cultural skills, as well as the basic computer applications (DHET, 2013) necessary to adapt, survive, and succeed and live meaningfully in a constantly changing world. LO is therefore important for student understanding and application of the content to their own lives and, in particular, for study success.

This study focuses on LO Level 2, as this is the starting point of the National Certificate (Vocational) (NCV) qualification and comprises students who are new to the TVET sector and faced with unfamiliar subject discourses. Level 2 students may also face language challenges in the classroom. The college, in agreement with all relevant stakeholders, adopted a language policy which states that English will be the principal language for teaching, learning, tests, assignments, examinations and study materials (EMIS Manager, 2015). This assumes that teaching and learning via English will result in epistemic access for students. This occurred despite the Language Policy for Higher Education that promotes multilingualism and indigenous languages (DHET, 2002). At the college, LO lecturers are non-mother-tongue speakers of English, yet they teach through this medium.

There is a disjuncture between the lofty aims of LO outlined above and the pass rates – which have been consistently low over the years at the college. Student pass rates in LO overall were 52.7% in 2013, 45.3% in 2014, and 48.5% in March 2015 (NCV HoD, 2015). A range of

factors may be responsible for this unsatisfactory performance: the college campus is situated in an economically depressed area and is home to previously disadvantaged citizens, the majority of whom speak Afrikaans and isiXhosa. Moreover, the area is characterised by high unemployment, pervasive substance abuse and high levels of violent crime, among other socio-economic problems (REOS, 2013). The context of the campus may also have some bearing on student achievement, as it draws students from the area. But this was not the focus of this particular study; this article probes the role of language only.

In addition to the contextual factors, students registered at the college have diverse home-language backgrounds: 4.3% Afrikaans, 2.8% English and 92.9% isiXhosa, with most of them coming from rural areas in the Eastern Cape (EMIS Manager, 2015). A lack of proficiency in the everyday usage of the English language as well as English as an academic language could be one factor affecting student access to, and participation and success, in LO. And, given their backgrounds, this lack of proficiency could have an impact on the students' confidence, reading fluency and expression in English.

Theoretical framings

This study is framed by theories of mother-tongue instruction, language policy, multilingual strategies and literacy as social practice. The South African educational landscape has been profoundly affected by its colonial legacies of language policy and the continuing dominance of, and high prestige accorded to. English globally. These legacies have led to the hegemony of English in post-school education, with resulting poor outcomes for students with English as an additional language. This situation is being perpetuated post-democracy, despite new language policies and the South African Constitution having bestowed official status on 11 languages.

Alexander (2013:84) states:

> The use of English as a language of tuition at tertiary level because of its *lingua franca* function among intellectuals and its global hegemony is no guarantee of educational equity. First-language speakers and proficient second-language speakers of English will continue to be advantaged *vis-à-vis* all others, that is, the vast majority of tertiary students.

Mother-tongue instruction

The privileged position of English perpetuates the continued existence of an elite group characterised by competencies in English (Granville, Janks, Mphahlele, Reed, Watson, Joseph & Ramani, 1998). While English is a dominant symbolic resource in the linguistic market (Bourdieu, 1991), it is the first language of a minority of South Africans.

Mother-tongue instruction is a counter-notion to the power of English. as it has been shown to have positive outcomes for students. First, it affords students opportunities to learn through the

language with which they are most familiar (Senadeera, 2010), that is, the language that they have acquired and use at home (Moyo, 2009). Secondly, it helps to develop confidence, self-esteem and identity in a multicultural society (Senadeera, 2010). Conversely, if students 'are required to acquire an unknown language in an unknown cultural pattern, they are likely to experience anxiety' (Menyuk & Brisk, 2005:74), because language defines identity in fundamental ways (Alexander, 2007). Moreover, unless students are competent in their first language, they will experience cognitive difficulties in their additional language (Owen-Smith, 2010). In the present educational dispensation, however, a student's first language, if not English, is reduced to a subject after a few years of schooling and an 'additional language' (English) becomes the language of teaching and learning. This arrangement results in poor outcomes for both languages. In the present study, the students could have been additionally disadvantaged: 80% of the sample had attended schools in areas designated for black people under the apartheid system (pejoratively known as 'township schools') that largely were poorly resourced and pursued anti-mother-tongue language policies.

Ramani and Joseph (2002:234) caution that African languages should not be developed as languages of teaching and learning without students also being given access to English, which is often viewed as the language of economic opportunity. Alexander (2013) agrees that local languages should be used for teaching fundamental disciplinary concepts while students are simultaneously exposed to a knowledge of English grammar and its registers. The perception that indigenous African languages have low developmental status (Bamgbose, 1991) is often cited as one of the most important obstacles to using indigenous African languages in education. However, the argument that indigenous languages cannot be developed is one that is countered by the many initiatives in higher education that do exactly this in South Africa (Hibbert & Van der Walt, 2014).

Language policy in South Africa

The vexing question is whether enablements of mother-tongue instruction and multilingualism as shown in research have been realised in policy and higher education settings. The Higher Education Act of 1997, the Council on Higher Education Report of 2001, the Language Policy for Higher Education (LPHE) and the Ministerial Report for the Development of African Languages as a Medium of Instruction in Higher Education all sought to promote the development of the indigenous languages as media of instruction. Furthermore, section 27(2) of the Higher Education Act of 1997 stipulates that the language policy of a tertiary institution needs to be developed in line with the LPHE. However, 16 years down the line, higher education institutions have been shown to be lethargic in implementing the language policies (DHET, 2018). The new draft language policy (DHET, 2018) now places more pressure on institutions to comply with these imperatives.

Translanguaging

There are differing interpretations of what bilinguals and multilinguals and their teachers do when they use their languages in life and learning. Wei (2017) notes that, when choosing

a theoretical lens, one should ask how this theory poses new and different questions about a current world. The theory that this study has chosen to best understand multilingualism today is translanguaging. This is because translanguaging describes practices and processes where languages are integrated in dynamic ways, moving beyond the linguistics of systems to participatory systems (Wei, 2017). The notion of code has come under scrutiny for its attention to precise linguistic features using a monolingual-bounded language lens, and Wei (2017) argues that, while multilinguals are aware of these linguistic codes, idealised boundaries and language names, they overcome these in their dynamic and fluid naturalised language practices. They are aware of the signifier and signified of the languages they speak and their structural features but use these signs in creative ways to make meaning. He reminds us that, amid notions of linguistic codes and language boundaries, the multilingual origins of languages should not be forgotten.

Code-switching explains what bilingual speakers do when they alternate between two languages they have at their disposable (Bullock & Toribio, 2009). Languages are seen as separate and distinct in their use of correct grammatical forms, that is, are the standard and not the practices in naturalised settings. Code-switching is a teaching and learning practice in the classroom and is included in the concept of translanguaging. Translanguaging, however, goes beyond code-switching. It is a different conceptualisation of what bilinguals and multilinguals do with language naturally in multilingual contexts such as South Africa. Garcia (2009) defines translanguaging as the process by which bilingual students and lecturers engage in complex conversational practices in order to make sense of, and communicate in, multilingual classrooms. It refers to multiple conversational practices as seen from the perspective of speakers themselves (Garcia, 2009) and is the communicative norm of multilingual communities and the simultaneous use of languages in society. It embraces flexibility in language use and the permeability of learning through two or more languages (Lewis, Jones & Baker, 2012), and is the fluid movement between languages by students (Garcia, 2009). According to Canagarajah (2011), code-switching treats language alternation as involving bilingual competence and switching between two different systems, while translanguaging treats the languages as part of a single integrated system with multilingual speakers moving between language repertoires in a single integrated system. The languages, varieties, registers and language ideologies of individuals in a multilingual South Africa constitute their linguistic repertoire (Busch, 2017) which they draw on in naturalised meaning-making interactions. These practices have been extended to schools. Code-switching does not account for creative communicative practices where languages are mixed. Scholars are aware that students have spontaneous communicative strategies that they use outside academic contexts, and are considering them for development in academic contexts (Canagarajah, 2011). Batyi's (2015) study is one such instance where successful use was made of translanguaging to help Tourism Studies students master academic discourses via translanguaging in class and online discussions. In the fourth industrial age, multilinguals who translanguage do so in transformative and innovative ways, in the process creating sense and meaning and new language practices that break boundaries with traditional linguistic structures. Translanguaging is a powerful tool for

teachers to draw on, as it foregrounds student agency, identity, and access to disciplinary discourses.

Social turn in linguistics

Linked to language policy and translanguaging are disciplinary discourses and their literacy practices, that is, the reading and writing practices that students need to access. This article argues that mother-tongue instruction and/or translanguaging facilitates such access. These reading and writing practices need to be discipline-specific in order for there to be genuine access and success. A lens such as New Literacy Studies is useful for interrogating the literacy practices students need to demonstrate success in. Its conceptualisations of literacy contributed to the social turn in linguistic theory that sees literacy as a social practice in which multiple literacies exist (Street, 2003). This practice approach means that each discipline has its own reading and writing practices. The role of the lecturer is therefore to ensure that students gain access to the localised academic literacies of the discipline. Students should not only be taught generic universal language 'skills' but should explicitly be taught the reading and writing practices of their discipline.

According to Street (2003), the autonomous model of literacy works from the assumption that literacy in itself will have effects autonomously on other social and cognitive practices. We need to go beyond the universal skills to localised practices to ensure transfer to the discipline. An autonomous model is a skills-based one; it conceals the cultural and ideological assumptions that underpin practice and presents literacy as neutral and universal. The alternative model proposed by Street (2003), the ideological model of literacy, offers a more culturally sensitive view of literacy practices, showing how they vary from one context to another. This model has a different premise from that of the autonomous model – and does not consider 'literacy as merely technical and neutral but as a social practice and argues for reading and writing to be addressed as rooted in conceptions of knowledge, identity and being' (Street, 2003:2). Literacy as a social practice is therefore not only about the technical and neutral skill of decoding and encoding words, but also about its embeddedness in the social context (Street, 2003). Literacy practices are shaped by social institutions and are embedded purposefully in cultural practices (Baynham & Prinsloo, 2001).

The LO Level 2 curriculum covers personal and career development, learning skills, health and well-being, and citizenship. Students are encouraged to read about challenges such as poverty, unemployment, drug abuse, unplanned teenage pregnancy, social and environmental injustice in society, environmental challenges, globalisation, and preventable lifestyle diseases such as HIV/AIDS and TB. Students are expected to consolidate in writing their own identities – whether in the form of research projects, tests or assignments as means of assessment. These would be the localised literacy practices of LO in which students would need to demonstrate success.

Methodology

This case study used a mixed-methods approach, that is, both qualitative and quantitative methods, to explore the use, attitude to and perceptions of English among three LO lecturers and 20 Level 2 LO students. The sample constituted 66.2% of a class of 30 LO students who volunteered to be part of the study. Such a small quantitative sample means that the findings cannot be generalised beyond this particular case study. The findings do, however, allude to the complexity of the linguistic context in the TVET sector. Qualitative data were obtained through the use of interviews with lecturers, while quantitative data were obtained through the use of Likert-scale questionnaires presented to students. The data were then analysed using a thematic approach.

The purpose behind a triangulated mixed-methods design was to gain a deeper understanding of the research problem through merging, analysing and interpreting quantitative and qualitative data collected concurrently to strengthen both the qualitative and the quantitative results (Creswell, 2008). Mixed methods, therefore, attempt to understand multiple viewpoints. When used together, quantitative and qualitative methods complement each other and allow for a more robust analysis, drawing on the strengths of each (Tashakkori, Teddlie & Teddlie, 1998), and, together, they allow a better understanding of the problem than each approach alone would do (Creswell, 2008). Creswell states that the mixed-methods approach gives a better picture and argument, as it works with more evidence. Mixed methods is thus a rich field for combining narrative and numbers.

In this study, quantitative questionnaires were used to interrogate student proficiency in English and their attitudes to, and experiences of, English as a language of teaching and learning. The questionnaires were in English. Qualitative data from lecturer interviews were used to expand, clarify or corroborate the quantitative data gained from the students. The questionnaire also comprised open-ended questions for students to provide details about their language experiences, so not only hard quantitative data was collected. The qualitative data provided a more nuanced lens on the data provided by the students, as it allowed the researcher to understand, discover and examine more fully the nature of the interactions in multilingual classroom settings.

This study attempted to answer the following main research question: How does English, as a language of teaching and learning, affect the academic performance of LO students in the National Certificate (Vocational) (NCV) Level 2? The themes identified from the main research question, and coded from the interviews and questionnaires, were as follows:

- Language proficiency;
- Student performance in LO;
- The impact of English as the language of teaching and learning;
- Multilingual strategies; and
- Language preferences.

Findings

The findings present responses to the research question on the impact of English as language of teaching and learning on the academic performance of LO Level 2 students.

Language proficiency

Interviews with lecturers

The lecturers were asked about their English-language proficiency in order to ascertain the confidence levels of lecturers in the use of English as language of teaching and learning, and to find out whether English proficiency affected LO teaching. If lecturers were confident teaching through the medium of English, this could help students gain access to the discourse of LO. Two lecturers reported that they had not majored in English but had studied English at tertiary level. They were therefore both comfortable teaching via English as language of teaching and learning: '*I'm pretty comfortable with English*' (Lecturer B) and '*It's much easier teaching in English*' (Lecturer C).

The lecturers were asked if they felt satisfied that all LO content areas were covered and understood by teaching through the medium of English or if any students had missed out on any content. Lecturer B responded that there were aspects that students did not understand and here she translated content to facilitate understanding: '*[If] I felt at the time [students were] missing [something] … we translated*'. Lecturer C started off by saying that she did not feel that she had missed any content, but added '*there are a few things you would like to teach more in your own language just to ensure understanding from the students' side*'. Here, she was seeing that language could be a barrier to student understanding of concepts. Alexander (2013) has argued that a lack of proficiency in English prevents students in higher education from understanding subject content.

When asked about student proficiency in English, the lecturers responded that problems arose when students needed to answer questions: '*The problem comes when they have to reply, when they have to discuss, when they have to express themselves*' (Lecturer B). Lecturer A responded that English '*serves as a language barrier*', as most students were isiXhosa and Afrikaans mother-tongue speakers. Students therefore did not have the proficiency to engage in discussions, although they understood what their lecturers were saying. Lecturer B noted that students regarded English as a formal language only to be used in class or when speaking to a white person. This may also militate against their gaining proficiency in the language.

Questionnaire to students

Student proficiency in, and attitudes to, their mother tongues needed probing, as this was important in a study on the impact of a language of teaching and learning. It could show how perceived proficiencies matched performance as well as the value placed on languages. Student responses to the question of proficiency in their mother tongue (isiXhosa and Afrikaans) were as follows: 14 (70%) students indicated that they could read, write and speak it fluently; 4

(20%) regarded their ability to read, write and speak as average; 1 (5%) considered their ability to be poor; while only 1 (5%) could speak just the mother tongue. These are subjective student opinions and their proficiency levels were not tested in this study.

In response to the question whether it was important for them to learn to read, write and speak well in their mother tongue, the response was 'Yes' for 19 (95%) of the students in contrast to 1 (5%) who said 'No'. Clearly, then, this highlights the fact that the students considered the ability to read, speak and write in their mother tongue to be important. In a similar vein, to the question of whether the students considered it important to learn to read, write and read well in English, 20 (100%) students responded positively.

In response to the question about the areas in which they experienced the most difficulty with English (in LO), 8 (40%) students indicated that they had difficulty speaking the language; 4 (20%) had difficulty reading the language; 4 (20%) experienced difficulty in writing the language; and 3 (15%) had a problem with listening to the language spoken. One participant did not respond to this question. Most students encountered challenges with the practices of English, despite indicating that it was important to have proficiency in the language.

Student performance in Life Orientation

Interviews with lecturers

The focus of this study was to identify the effects of English on the academic performance of students. One way of doing that was to determine lecturer perceptions about the level of student performance in LO. According to Lecturer A, LO comprises two components: Life Skills and Information and Communications Technology (ICT), with Life Skills counting 60% and ICT 40% towards the final mark. Lecturer A stated that students did not perform well in Life Skills. Lecturer B was of the view that student performance overall in LO was poor: '*It is worse in assessments*' and '*they [the students] are good in discussions; they are not as good in assessments*'. Here, Lecturer B contradicted what was previously said about students not being able to express themselves during discussions. This contradiction shows the complexity of language at this college, as even lecturer assessment of student language proficiency is uneven and opaque. It may also be because Lecturer B is comparing assessments with discussions and that student performance in the latter is better. Lecturer C stated '*their [the students'] performance is good*'. This statement was later qualified when Lecturer C noted that students excelled at ICT and not the theoretical aspects of Life Skills.

When asked for reasons for this performance, Lecturer A stated that students could not express themselves in English. Lecturer B indicated an inability to understand questions: *'They misunderstand questions when they are written down and they are not explained properly. You know your students; when you ask a question, you ask it in a way that they will understand and you will put in a little bit of explanation, but when it's assessments and exams, a question is raised and it isn't explained*'. Scaffolding, or the support given to students when learning a new concept (Bruner, 1978), was not present in assessments which were context-reduced, therefore being

cognitively more demanding of students (Cummins, 1984). Finally, Lecturer C was emphatic about the role of English in student performance: '*It does … definitely … play a role.'*

Questionnaire to students

Student responses to the question about their performance in LO were as follows: Of the 20 participants, 3 (15%) indicated that their performance was excellent; 12 (60%) felt that their performance was good; and 5 (25%) indicated that their performance was average. As 15% of the students regarded their performance as excellent and 60% considered their performance as good, and only 25% considered their performance to be average, it can be concluded that the majority of the students (75%) saw themselves as having performed well in LO.

The reasons given were as follows: '*It's because I understand the subject very well and most of the things we talk about in class are the things that go true most of our lives*'; and *'I understand LO because mostly it's what is happening to our lives*'. Student responses appear to be based on the topics covered and on classroom discussion, which may not be cognitively demanding. The nature of the performance may therefore be based on how well they related to the topics and what was discussed in class, not necessarily on their performance in formal assessments. Student perceptions of their performance contradicted those of their lecturers, with the latter basing their perceptions on performance in assessments, not that in class or on real-life applicability.

Impact of English as language of teaching and learning

Interviews with lecturers

The lecturers were asked specifically whether the use of English as language of teaching and learning negatively affected student LO performance, as alluded to above. All three lecturers felt that the academic performance of students was affected, as the students tended to misunderstand assessment and task instructions and questions. Lecturer A reported that '*their answers are irrelevant to questions and then they lose marks*', and that '*students don't perform well, as they don't know how to express themselves in English*'. Lecturer B indicated that students performed better in class discussions than in formal assessments: '*They misunderstand questions when they are written down and they [do not] explain properly.*' Lecturer C confirmed that the students' struggled with English: '*You would get to ask questions in English but when they respond, they respond in Xhosa',* and '*they understand the question but it is the response and also their inability to ask questions should they not understand something*'. The importance of mother tongue, as the language in which students are best able to express cognitive learning, is shown here.

Questionnaire to students

Students were asked if they experienced difficulty understanding English as language of teaching and learning in class, and their responses were as follows: 5 (25%) experienced difficulty; 14 (70%) did not experience any difficulty in understanding English; and 1 (5%) did not respond. If the foregoing statistical representation to this question is anything to go by, then the vast majority of the participants perceived themselves to be comfortable with understanding English. The students may have perceived understanding English as their understanding of lecturer

input and not of their own engagement with content in answering questions and assessments. The data contradict that of the language proficiency findings, where all students indicated that they experienced difficulty with English. However, the students indicated in this section that they were comfortable understanding English when the lecturer explained.

Student responses to the question, 'What effect does English, used as a language of teaching and learning, have on your Life Orientation academic performance?,' were as follows: causes me not to perform well: 3 (10%); improves my performance: 12 (60%); and does not affect my performance: 5 (25%). Given that the lecturers indicated that the students performed below average and that the statistics showed pass rates of below 50%, these student responses could be read as a perception of the importance of English and the aspirational value the language may hold. They did not necessarily reflect what was happening in reality with their assessments.

Student responses to the statement, 'The use of English in Life Orientation causes me great stress', were as follows: strongly disagree: 6 (30%); disagree: 11 (55%); and agree: 3 (15%). This means that 85% of the students in this group did not perceive English to be the cause of stress. This may be as a result of a positive attitude to the acquisition of English and not necessarily of the stress brought on by performance.

To ascertain whether the students had difficulty expressing themselves in English, they had to respond to the following statement: 'I experience difficulty when communicating in English with my lecturer in the LO class.' To this statement, the responses were as follows: strongly disagree: 5 (25%); disagree: 9 (45%); unsure: 2 (10%); and agree: 4 (20%). This means that 70% of students stated that they did not find it difficult to express themselves in English. The perception may be that this refers to speaking only and not writing, as well as to their aspiration to speak well.

To determine student understanding of a predominantly English lecture, they were asked to indicate their responses to the statement: 'I find it difficult to understand Life Orientation when the lecturer mostly uses English.' The student responses were as follows: strongly disagree: 1 (5%); disagree: 11 (55%); unsure: 4 (20%); agree: 3 (15%); and strongly agree: 1 (5%). This 60% response confirms once again previous findings that students perceived themselves as able to understand English as a language of teaching and learning in the LO classroom.

Multilingual strategies

Interviews with lecturers

It was important to find out whether there were any interventions in the classroom intended to improve student performance, and so lecturer opinions were solicited on how they sought to improve English proficiency and whether multilingual teaching strategies were used during teaching and learning. This was especially significant, because many authors have pointed to the impact of English on student performance.

In order to improve English proficiency, Lecturer A responded that they worked in collaboration with English lecturers to focus on '*reading, speaking, writing and interpretation of text*' and that '*students were encouraged to participate in class discussions*'. All three lecturers responded that isiXhosa was used during teaching to help students to understand content. Lecturer A held the strong view that, as English was (and should be) the language of teaching and learning, students needed to show their proficiency by answering in it. Banda (2009) highlights the prevalence of this attitude to English as the language for economic advancement. Despite language in education policies that encourages mother-tongue instruction, many higher education institutions continue to favour English. Lecturer A allowed students to speak their mother tongue, as it made '*it easier for them to [understand] in their own language*'. Lecturer B stated that '*they are allowed to put in their Xhosa. I do allow them to …*'. However, this seemed to be kept to a minimum, as there were both Afrikaans- and isiXhosa-speaking students in the class, according to Lecturer B. Lecturer C's response was that students were allowed to use isiXhosa when discussing content in class, but that they knew that English was the main language. No mention was made of Afrikaans students using their mother tongue in class.

Questionnaire to students

Students were asked to respond to the following statement: 'Speaking in isiXhosa/Afrikaans when discussing content with fellow students in class helps to improve their understanding and performance in Life Orientation.' The students responded as follows: strongly agree: 2 (10%); agree: 11 (55%); disagree: 3 (15%); strongly disagree: 4 (20%). This means that 65% of students saw the value of their mother tongue in their performance.

When asked whether writing their ideas in their mother tongue first would help them do well in their assignments, student responses were as follows: 1 student (5%) strongly disagreed; 6 (30%) disagreed; 3 (15%) were unsure; 4 (20%) agreed; and 6 (30%) strongly agreed. Half of the students therefore saw the writing of ideas in their mother tongue first as a valuable writing strategy.

The students were also asked if they understood content better when the lecturer used both isiXhosa/Afrikaans and English to explain concepts. Students responded in the following manner: 4 (20%) disagreed; 1 (5%) was unsure; 9 (45%) agreed; and 6 (30%) strongly agreed. Once again, 75% of students showed here the significant role played by the lecturer's use of multilingual strategies.

A significant question raised was whether the students felt that English should be replaced with their mother tongue in LO classes. The majority of the students disagreed: 2 (10%) strongly disagreed; 13 (65%) disagreed; 3 (15%) were unsure; and 2 (10%) agreed. Reasons given for their disapproval of replacing English with their mother tongue were: '*It will be difficult to replace English with one's mother tongue because we are different races in the classroom*'; and '*If Xhosa is used, then we will never learn proper English. But Xhosa will help us get good marks*'.

Language preferences

Questionnaire to students

In response to the question, 'Which language did students feel would provide them with better opportunities for a job?', the students responded as follows: 17 (85%) said English, thereby highlighting perceptions of the crucial role of English for the job market; 1 (5%) said isiXhosa; and 2 (10%) said other languages. The majority favoured English, in keeping with general perceptions of English as a global economic language.

When asked if they would like the opportunity to write their assessments in their mother tongue, the students' responses were 10 (50%) 'Yes' and 10 (50%) 'No'. This is quite a significant finding, as it reveals that students have insight into the advantages that their mother tongue could have in respect of their performance. It also indicates student awareness that they may find it easier to write in their mother tongue, although this depends on whether or not they experienced an additive or subtractive language approach in their schooling. If subtractive, they would have competency neither in their mother tongue nor in the language of teaching and learning.

Having discussed the data findings, the focus now turns to the conclusions and recommendations that emanate from the findings.

Conclusions and recommendations

The data reveal the complexities and contradictions of the lived experiences of language, or language being, in the LO class at this TVET college that involve student performance; student and lecturer perceptions of student performance; aspirations regarding the acquisition of English; language ideologies; and student identity. Students perform poorly in LO but believe themselves to be performing well; they value both English and their mother tongue; and they aspire to be better English-speakers while simultaneously regarding English as the preserve of the classroom and of white people. The data are also characterised by contradictory evidence of student proficiencies offered by both students and lecturers. This shows the opaque nature of the language question at the college and the lack of a language of description for the linguistic complexities and contradictions.

In response to the main research question, the findings show that English has a profound impact on student performance. Students have such a positive regard for what the language holds that it blinds them to their struggles with it. Contradictory evidence is offered for their English proficiency because, on the one hand, they indicate their struggles with it and, on the other, claim to understand it well when using it in the LO class and as applied to their lives. The majority of the students did not speak English frequently, nor did they have it as a home language. This mismatch could be because of the high prestige and currency of English in a globalised world: English is regarded as the language of aspiration (Silva, 1997) despite it being spoken by only 9.6% of South Africans as a first language (Statistics SA, 2011). Students at the TVET college in this study have

constructed themselves as proficient in English despite their poor performance. The study did not probe deeply the underlying language ideologies responsible for these perceptions because the focus was on the impact of language on performance. It is, however, assumed that students may be buying into international language discourses that privilege English. It is also highly likely that students may want to escape the servitude, exploitation and oppression of a recent past, where they would have been constructed as a 'dispensable other' (Magubane, 2007:244), and also the social justice gaps that continue in a post-democratic South Africa. The students in this study also indicated their belief that English would provide them with better job opportunities. Mayaba, Ralarala and Angu (2018) refer to the practices in higher education that condition students to believe that English mastery is what is needed to succeed. Monoglossic language ideologies which imply that only an ideal language user has and uses a single language (which is most likely to be English) have been given prominence not only in how South African schooling takes place, but also in how language acquisition and learning are constructed (McKinney, 2017). The mismatch between student and lecturer perceptions of student English proficiency ultimately leads to negative outcomes for students.

Many other factors were responsible for student performance in LO: attitude to the subject, theoretical versus practical components of the subject, and student background. However, English played a significant role in this performance: the evidence shows that students want their English to improve even though they experience challenges with it.

Data contradictions also appear in lecturer conclusions about student English proficiencies, from an initial comment that students do not express themselves well during discussions to a later comment about 'being good' at these. It may be that students did not engage as well as expected in discussions, but that their performance in discussions is better than in their assessments. This may be because of the cognitive academic language required in assessments. The contradictions may also occur because there is no language of description for the nuances of language in the class.

Although the lecturers foregrounded the importance of English, they recognised that it was a barrier to understanding and affected student performance. An analysis of lecturer interviews and student questionnaires revealed that the students were experiencing difficulty speaking, reading and writing in English. The lecturers adapted their teaching strategies by including isiXhosa to facilitate understanding. The data also indicated that the lecturers considered multilingualism to be the most suitable teaching medium or method.

The students indicated that they would prefer to write drafts of their assignments initially in their mother tongue. The findings also suggested that it was necessary for the lecturer to use a variety of multilingual strategies to ensure that the students enjoyed success in an important subject such as LO. The students needed support to facilitate their understanding of assessment instructions and concepts. Moreover, the majority of the students considered themselves to be proficient in their mother tongue and had a positive regard for both their mother tongue and English.

Based on the findings and conclusions, this study makes recommendations regarding the teaching of English to, and the learning of English by, students. These include developing a language of description for language complexities at the college. The language of description could be developed through ongoing conversations about linguistic identities and challenges. This linguistic self-discovery could enhance self-recovery of language. The study also recommends the intentional and structured use of multilingual classroom strategies for students to acquire the ideological literacy practices of LO, and subject–lecturer collaboration with language lecturers. Each context needs an analysis of its complexities for meaningful interventions and so, too, this college needs to analyse its own experiences. This particular LO class was a multilingual one and it was therefore best suited to a multilingual teaching and learning approach. Interventions could have included multilingual strategies such as translanguaging (including code-switching and translating) in group discussions and writing, and multilingual teaching material to better suit this context. Multilingual strategies could enhance the acquisition of languages, including English and mother tongue, and the discourses of their disciplines. Students could be given the option to write assessments in different languages to improve their performance. It also remains to be seen if students are very proficient in isiXhosa or Afrikaans. If, as is suspected, they are not, then multilingual support could enhance their acquisition of all their languages.

Adding to the complexity of the language of teaching and learning was the view held by lecturers that teaching via English was easier, as this was the discourse they as lecturers were used to. They did, however, acknowledge the value of multilingualism. This raises the question of how to prepare lecturers for teaching in multilingual contexts.

The study therefore recommends the development of a bottom-up multilingual language policy at the college to aid the acquisition of subjects such as LO. A bottom-up policy ensures linguistic citizenship (Stroud, 2001) by listening to all the voices of both students and staff in order to explore and resolve linguistic complexities. It would help the college to understand how they got to this place of language, who they are, and how to proceed from it. Such a language policy should seek to develop indigenous languages at the college as languages of teaching and learning, and allow for multilingual strategies to be embedded more deeply into curricula such as that of LO. Moreover, development opportunities should be put in place for lecturers to teach in multilingual contexts, as should forums for ongoing discussion of the dynamics and fluidities of languages at the college and interrogation of the ideological literacy practices of LO. Students also need to be given access to English as part of their linguistic repertoire so as to promote their mobility in an interconnected world. Reconceiving the language of teaching and learning in African post-school education will help mitigate barriers to access and success and so enhance equity and social justice. Doing so will help us to start making sense of the linguistic complexities and contradictions in the post-school sector in critical decolonial ways, and to see and write the stories of our language being.

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Academic relationships and their influences on learning for students with a hearing disability: The case of Kyambogo University, Uganda

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ABSTRACT

Optimising the learning of students with a hearing disability may require them to have academic relationships among themselves, with learners who have other types of disability, and with those without disabilities. The Community-Based Rehabilitation (CBR) Guidelines confirm that relationships are important for persons with disabilities, including those with a hearing disability, as their fulfilment is essential to personal growth and development. Unfortunately, academic relationships may be a struggle for students with a hearing disability because of inherent and social challenges. This study reveals that some students with a hearing disability at Kyambogo University had good relationships, while others had unpleasant ones. Good relationships helped them to learn, cope with challenges in learning, access learning materials and academic support, and embrace diversity. Delayed communication had a negative influence on their academic relationships. The findings about learning together with, and from, other learners confirm ubuntu's 'shared collective humanness and responsibility'. They also confirm that the social model of disability can question barriers to learning and that sound academic relationships are contributing to efforts to overcome barriers and enhance inclusion. Understanding and balancing the interplay between academic relationships, barriers, and their influences on learning can help to improve access to, and success in, the education of learners with a hearing disability.

KEYWORDS

academic relationships; adult learning; barriers; hearing disability; participation

Introduction

This article is based on a qualitative case study of academic relationships and their influences on learning for students with a hearing disability at Kyambogo University. In this study, 'academic relationships' refers to students' close connections formed through interactions for academic purposes. The term includes how people behave towards one another (Hornby, 2010). The study investigated how a cohort of students established and maintained relationships with one another – with students with disabilities, with students without disabilities and with lecturers – and how these relationships influenced their learning. The focus was on hearing disability rather than hearing impairment, because hearing impairment is understood as the lack of a hearing mechanism (Barnes & Mercer, 2003), whereas hearing disability in Uganda is described in the Disability Act as the 'permanent and substantial functional limitations caused by the hearing impairment and environmental barriers resulting in limited participation' (MoGLSD, 2006:28). The findings are discussed in the context of the social model of disability and the African philosophy of ubuntu. As a member of the academic staff in a faculty running programmes on disability, the lead author was motivated to conduct the study while developing sensitisation materials for making Kyambogo University more inclusive to persons with disabilities (PWDs). This was for a project supported by the African Development Bank titled 'Support to Higher Education, Science and Technology' (AfDB-HEST). The lead author noted that the majority of the students without disabilities believed that the students with disabilities depended on others and were not self-directed. Knowles (1973:45) observes that self-directedness is 'identified with an adult role'. Self-directedness is expected of students in this study because they are above 18 years of age, the legal age for adulthood in Uganda.

Background

The Community-Based Rehabilitation (CBR) Guidelines (WHO, 2010c) affirm that access to higher education greatly contributes to PWDs' full inclusion in society. Despite this affirmation and legal requirements in many countries, it is not clear to what extent African universities, including Kyambogo University, are inclusive. That is why Emong and Eron (2016) propose that research studies on students with disabilities be conducted to advance planning that is disability-inclusive. In addition, Rubenson and Desjardins (2009) urge for exploration into and reflection on barriers, as this can enhance our understanding of the learning processes of students with a hearing disability.

In the 2016/2017 academic year, Kyambogo University had 27 students with a hearing disability out of a student population of about 25 000. The University is renowned for its special needs education and disability-related programmes. This is reflected in its objectives, which take into account disability and rehabilitation. These objectives contribute to the University's mission 'to advance and promote the knowledge and development of skills in science, technology, education, and in such other fields having regard for quality, *equity* (our emphasis), progress and transformation of society' (Kyambogo University, 2014). Equity is a

key factor at Kyambogo University, and, therefore, there must be fairness to PWDs and no discrimination against or marginalisation of them.

In 2014, the University put in place a Disability Policy in addition to improving accessibility and conducting sensitisations. The policy provides for disability inclusivity and equal opportunities for students with disabilities (Kyambogo University, 2014:ii) and also makes provision for an enabling environment which facilitates academic interactions that enhance the potential of students with and without disabilities. This policy is in line with the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD), especially Article 8 on disability inclusion. This article calls for the promotion of positive perceptions and greater social awareness of, and respect for, PWDs at all levels of education (UN, 2006). The University's Disability Policy is aligned to the Constitution of the Republic of Uganda (Uganda Government, 1995), the National Policy on Disability in Uganda of 2006 (MoGLSD, 2006), and the University and Other Tertiary Institutions Act of 2001 (Uganda Government, 2001), which provide for non-discrimination.

In line with these policies and in a bid to improve its capacity to cater for students with disabilities, the University started implementing the AfDB-HEST Project in 2015 (African Development Bank, 2012). This project focuses on making the University accessible to, and supportive of, learning for PWDs, on increasing their participation in learning, and on adjusting and diversifying approaches, methods, materials and environments so that they demonstrate their potential. These adaptations aim at encouraging learners with and without disabilities to interact with one another in academic activities. The project supports sensitisations and services such as counselling, guidance, rehabilitation and capacity-building for staff and students with respect to skills such as mobility and orientation, sign language and braille.

As mentioned earlier, it is believed that students with a hearing disability, like everyone else, have academic relationships with other students with or without disabilities. They attend the same lectures in the same rooms, and, in some cases, go to the same libraries and do course work together with students without a disability (Opio, 2014). However, students with disabilities have a designated resource room in the Faculty of Special Needs and Rehabilitation where braille transcribers, job access with speed (JAWS) software, and assorted videos can be accessed. JAWS is software for screen-reading, screen magnification and braille display for blind and visually impaired computer users (Freedom Scientific Inc., 2013).

The above background shows that the academic problems of students with a hearing disability at Kyambogo University have not been adequately investigated through research. To help fill this gap, this study investigated the academic relationships of students with a hearing disability, and how these relationships have influenced their learning. Although it is known that students with a hearing disability are accepted in academic groups comprising students with and without disabilities (Opio, 2014), how this influences the learning of the former group is not clearly understood. This unresolved situation prompted this study. The results

from this study may guide administrators and stakeholders to improve educational facilities at Kyambogo University and other universities so as to make them more favourable to students with a hearing disability, and to other students generally.

Literature review

Experiences of students with a hearing disability in establishing and maintaining academic relationships

The CBR Guidelines (WHO, 2010a:5) emphasise that relationships 'are as important for PWDs as for everyone else'. They also affirm that 'fulfilling personal relationships are essential for personal growth and development' (WHO, 2010a:19). Unfortunately, it is noted in the same guidelines that, 'in many societies, cultural taboos limit the free discussion of relationships in relation to disability' (WHO, 2010b:24). These taboos serve to deny PWDs access to information and make them vulnerable to manipulation and being taken advantage of. PWDs' vulnerability is exacerbated by their 'low self-esteem and feelings of being unattractive or undesirable' and by 'their need for social acceptance and inclusion' (WHO, 2010b:25). The low self-esteem and poor self-image can occur if society fails to accommodate the needs of PWDs in educational settings.

In addition, Walberg (1984) states that social interaction and surroundings such as students' family members, classmates, and peers in and outside school have an impact on student success in learning. It has also been argued that academic achievement may require that students interact and relate among themselves in academic dimensions so as to learn (Chickering & Reisser, 1993). In addition, establishing identity and developing independence and interdependence at universities are important for students with a hearing impairment, as this enables them to make emotional adjustments (Lukomski, 2007) and to remain in educational institutions and not drop out (Stinson & Walter, 1997). Unfortunately, establishing and maintaining academic relationships may be a struggle for students with a hearing disability (Lang, 2002).

Healthy academic relationships provide fertile ground for inclusive practices for all students, which, in turn, improve students with disabilities' access to academic resources, help to integrate knowledge of disability into academic programmes, and produce graduates capable of confronting disability issues in their world of work (Ohajunwa, McKenzie & Lorenzo, 2015). For inclusion to be a reality, however, members of staff should have the capacity to make it happen, as suggested by Murray, Farrington, Sekol and Olsen (2009), who argue that faculty staff and graduates who have undergone some disability training are more likely to accommodate reasonable learning opportunities for students with disabilities.

It is believed that students with a hearing disability at universities are academically challenged during learning due to mediation through the use of sign-language interpreters, because mediation delays information flow, as observed by the co-author. In some cases,

interpreters provide incorrect interpretations, especially when they are not knowledgeable about the subject matter being taught. In addition, interpreters who are expected to help overcome communication difficulties between students with a hearing disability, other students and teachers (Martins, 2006) do not provide students with a hearing disability with the same degree of accessibility to information as other students who can hear. This might be because most students with a hearing disability grew up in linguistically challenged environments and may not make effective use of the interpreting (Marschark, Sapere, Convertino & Seewagen, 2005).

Other communication challenges that accompany interpreting are noted by Foster, Long and Snell (1999) as: a delay in receiving information (the time between what is spoken and its interpretation); and breaks in eye contact while the teacher writes on the board, walks across the room or reads a document, which prevents lip reading. They add that information is lost while the deaf person is shifting between looking at the interpreter and observing the lecturer handling an object or working with images. This can affect their learning pace and their academic relationships with educators, since such students may completely miss the information or receive it much later than the others.

The influence of relationships of students with a hearing disability on their learning

It is argued that good academic relationships among students can lead to the successful completion of learning tasks within their zone of proximal development (ZPD) and the eventual use of what they learnt independently (Ormrod, 2008). It is also noted by Chickering & Reisser (1993) that academic achievements require students to interact and relate among themselves. However, students with a hearing disability may have receptive and/or expressive limitations (Adoyo, 2007), causing some people to label them as absent-minded or senile (Hetu, Jones & Getty, 1993). This threatens their self-image and self-esteem and is a potential barrier to their learning.

A study conducted in India by Maurya and Singh (2016) on the self-concept of hearing-impaired children and its effect on academic achievement reported that 62% of children had an average self-concept of themselves. This average self-concept reduced their ability to interact and communicate with society, which had a negative impact on their learning. Another study by Foster, Long and Snell (1999) confirmed that students with a hearing disability do not have as much of a sense of belonging as their peers who can hear, and that this negatively affects their learning.

Most students with a hearing disability have limited opportunities to interact effectively and satisfactorily with others due to delayed language development earlier in their lives (Quigley & Paul, 1994; Moores, 1996). It can therefore be argued that the inclusion of students with a hearing disability in academic relationships at universities requires that they have the social and communication skills to interact with fellow students and academic staff.

Finally, we refer to Lang (2002), who draws attention to two important issues: first, that there is little direct communication between students with a hearing disability and those who can hear, or even with their lecturers. This places the students in a dependency situation as they relate to others academically. Secondly, support services, which, while necessary, may reinforce the stigma of difference in so far as they require special logistics for adapting schedules, constitute an additional activity load, and require an additional commitment. This therefore calls for communication challenges to be addressed and for careful navigation of the spectrum of support provided.

Theoretical frames

This study is framed within African ubuntu philosophy and a social model of disability. Berghs (2017) elaborates on ubuntu philosophy and its relevance to an African model of disability. She argues that the ubuntu philosophy is a world view of 'shared collective humanness and responsibility' (Berghs, 2017:2). In ubuntu philosophy, disability is a social construct that explains 'shared meanings that society, as human collective' attaches to disablement as a form of diversity of humankind (Berghs, 2017:2). She notes that the diversity of ubuntu does not condone injustices but reveres 'respectful community dialogue and consensus for a restorative justice' (Berghs, 2017:2) and respects 'collective social action for a shared humanity against oppression and injustice' (Berghs, 2017:2). Berghs further argues that, like the social model of disability, 'ubuntu does not place individual blame on a child, nor mother, but asks why a community, institution or state is failing in its compassionate responsibilities towards upholding respect for human diversity' (Berghs, 2017:6). Ubuntu philosophy was therefore used to understand and explain the academic interaction, social support, shared responsibilities, and roles in respect of students with a hearing disability. African ubuntu philosophies conceptualise education as learning from others and as participation in community or group activities, including ceremonies, festivals and folklore (Nyerere, 1973; Ocitti, 1988).

The social model of disability is relevant to this study because it views disability not as a personal medical condition (Mitchell & Snyder, 1997; Taylor, 1999; Clark, 2006) but as a social phenomenon. In the medical model, PWDs are assumed to have physical problems which need medical interventions such as treatment, cure or other interventions by medical professionals. The model views PWDs as dependants, locating the problem within PWDs and not within the society or environment in which they live (Oliver, 1996). On the other hand, proponents of the social model argue that it is economic, cultural, attitudinal, physical and social barriers which stop people with disabilities from participating fully in society (Oliver, 1996; Ndeezi, 2004). In this model, society is viewed as the problem, not the PWD. That is why Oliver argues that it is able-bodied society, rather than PWDs, that needs to be examined. Germon (2000) suggests that disability should be viewed as the discrimination faced. Nuwagaba and Rule (2015:260) argue that the social model views disability as 'societal and environmental barriers/factors that discriminate against people with impairments' and, therefore, that change should largely target society and the environment. Viewing disability

through the social model thus provides a framework for analysing: the factors that influence the interactions of students with disabilities, and the environmental (social and physical) conditions at Kyambogo and other universities and their effects on learning. It helps to explain the barriers students with disabilities face in establishing and maintaining relationships as learners, and the kinds of support they receive to overcome these barriers.

Research methodology

Research tradition

The study employed a qualitative research tradition because of its ability to explain research participants' points of view and to factor in the context of the study (Bryman, 2008). Bryman further notes that qualitative approaches use words to explain features, characteristics and attributes of a phenomenon, as opposed to quantitative approaches that use data expressed in quantities and measurement using numbers. Qualitative approaches can thus be used 'for exploring and understanding the meaning [that] individuals or groups ascribe to a social or human problem' (Cresswell, 2014:32). They use themes, whereas quantitative approaches usually involve statistical procedures. As the study focused on meanings attached to the relationships of persons with a hearing disability, their influence on learning, as well as the context in which these relationships occur, a qualitative approach was deemed appropriate.

Research design

The design of choice was a descriptive, cross-sectional case study, as Kyambogo is one of many universities in Uganda. The design is appropriate to describing participants' points of view regarding their academic relationship practices (Levin, 2006). A case study is described as 'an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between the phenomenon and context are not clearly evident' (Yin, 1994:13). Chilisa and Preece (2005) and Rule and John (2011) agree with Yin, adding that case studies are in-depth. Case studies can be both exploratory and explanatory (Yin, 2003); they allow 'exploration and understanding of complex issues … particularly when a holistic in-depth investigation is required' (Zaidah, 2007:1). In addition, Simons (2009) and Nuwagaba and Rule (2015) assert that case studies capture the multiplicity and uniqueness of phenomena and can use multiple sources of data. Zaidah (2007) adds that case studies allow triangulation, which helps to improve validity. Although Yin (2003) and Bryman (2008) criticise the case study for its lack of generalisability, Yin (2009) and Rule and John (2011) argue that its results can have both analytical and naturalistic generalisability. Wikfeldt (2017) notes that analytic generalisation is not about the representativeness of the population but about valid descriptions with enough depth to allow generalisability in relation to a field of understanding. As for naturalistic generalisation, users of study results 'recognize similarities in case study details and find descriptions that resonate with their own experiences', and decide 'whether or not the findings can be applied to their specific situation' (Wikfeldt, 2017:5).

Selection of research participants

The study involved eight participants, who were selected through snowball sampling (Browne, 2005). This is a non-probability sampling strategy where each participant is identified by another until the sample is realised. A list of students with hearing impairment was obtained from the Disability Resource Room. After that, two students known to the co-researcher were approached to help identify the participants in the study, who, in turn, identified others until the sample of eight was realised.

A young academic staff member worked as a co-researcher and this made it easier to obtain reliable data, because the youth of the co-researcher helped reduce the social distance between the students and the research team. This was made possible since the young academic could easily relate to the students because of the small age difference between them (Chappell, Rule, Dlamini & Nkala, 2014).

Profiles of participants

The participants were drawn from all the years of study and included more females than males. Three of the participants described their hearing impairment as 'hard of hearing', one indicated she was totally deaf, two mentioned theirs was severe, and another two mentioned that their hearing loss was moderate, as they could hear very loud sounds.

All the participants were adults and the ages of the majority were beyond the early twenties, an indicator that, at Kyambogo University, PWDs were not being left out in the enrolment of non-traditional students. Two of the participants were over 40 years of age, three were aged between 26 and 30, and another three were in the age range of 21 to 25 years. In terms of tribes, Itesot and Baganda each had two participants, and there was one participant from each of the following tribes: Acholi, Samia, Bakiga and Bafumbira. As for religion, three participants were Roman Catholic, three were Protestant, one was Muslim and another Pentecostal. The different tribes and religions represent the rich cultural and religious diversity of the University and Uganda as a whole.

Methods of data collection

The data were collected in January and February 2018. In-depth interviews were used for data collection because they 'allow active engagement with research participants, probing, deepening responses or engagement in dialogue' (Simons, 2009, cited in Nuwagaba, 2013:126). As the co-researcher knows sign-language interpreting, it was used during the in-depth interviews. The interviews were semi-structured and focused on issues such as demographic characteristics, qualities considered important in relationships, how relationships are established and maintained, how relationships affect learning, the barriers faced, and the strategies used to deal with those barriers. However, one student preferred responding in writing to the semi-structured interview guide than using sign-language interpreting; follow-up or probing questions were also

dealt with in writing. This went on until all the probing issues had been dealt with. Nuwagaba and Rule (2015) note that asking questions in writing and receiving written responses is an effective method of collecting data from persons with a hearing disability.

Data analysis

The data were analysed using thematic analysis – a type of qualitative analysis that classifies and presents data according to patterns that relate to it (Alhojailan, 2012). Alhojailan adds that such analysis facilitates the understanding of interpretations more widely and the issues at hand more diversely.

Open coding (Henning, Van Rensburg & Smit, 2004; Saldaña, 2009) was used to develop codes such as attitudes, friendship, discrimination, communication, interaction and experiences. These codes were grouped to form categories (much broader concepts) such as relationships, barriers, support and learning. Coding not only involved labelling, but also linking chunks of data to an idea. Through axial coding (Henning et al., 2004), the codes and categories were organised and reorganised in order to identify cross-cutting issues or links and to create an overall impression. Axial coding involves taking data that was split and organised according to codes during initial coding and reassembling it into new formations involving codes and categories so as to facilitate meaning-making.

Ethical issues

The researchers abided by the ethical guidelines for conducting research with PWDs, as suggested by the Uganda National Council of Science and Technology (UNCST) (2007:42). The research proposal was submitted to, and approved by, the Faculty of Special Needs and Rehabilitation and the University Research Grants and Publications Committee. These are responsible for ethical clearance. Informed consent was sought and obtained verbally (Nuwagaba & Rule, 2015), and anonymity and confidentiality were respected (Chilisa & Preece, 2005) by allocating numbers to the respondents when reporting. Although the participants guided the researcher in the identification of fellow participants, they did not know whether those they identified actually participated in the study or not. In some instances, the guidance involved identifying a hall of a residence where more than one student with a hearing disability resided. Chilisa and Preece (2005:231) argue that respect for anonymity and confidentiality is 'exercised to avoid embarrassment, pain, loss of self-esteem, psychological damage and the loss of dignity and self-respect that might occur when research participants or communities recognize themselves or are named in embarrassing descriptions in print'. The process described helped to minimise the dangers of identification.

Results

The results are discussed under three themes. The first theme covers the experiences of students with a hearing disability in establishing and maintaining academic relationships. In this section,

we describe the types of academic relationship students with a hearing disability had with fellow students with a hearing disability, with students with other categories of disability, with students without disabilities, and with lecturers. We also explain why the relationships were described as good or bad, how they began and were maintained, and the conditions that facilitated them.

The second theme is about the influence of the academic relationships of students with a hearing disability on their learning, and it explains the positive and negative influences on learning. The third theme concerns the strategies used to overcome the barriers to good relationships and learning.

Experiences of students with a hearing disability in establishing and maintaining academic relationships

Good academic relationships

All the participants revealed that the academic relationships between them and students with a hearing disability were good, as indicated:

> My relationships with other hearing-impaired students are good because we know each other and we inform each other about news and opportunities around us. [Participant 8]

> I am approachable and knowledgeable about sign language. I use it during interactions with my friends. [Participant 4]

> I have realised that fellow students with hearing disabilities can manage everything[;] … we are only hindered by the communication problem of not being able to hear. [Participant 3]

Their academic relationships with students with other categories of disability were also described as good, as the following response reveals:

> Students with other disabilities are cooperative. We know we are one family of disability and depend on one another for support while doing research and coursework. Sometimes, I am a guide to a blind student. [Participant 2]

As for their relationships with students without disabilities, two participants described them as pleasant. They said:

> My classmates got closer to me because, when they realised that I was better academically, they were humbled and would write requesting … assistance from me. They would exchange coursework with me so as to read mine, or I would help them in checking [the] Internet, as some of them had no idea about ICT. At the end I was a friend to all. [Participant 8]

Students without disabilities help me; we cooperate and socialise well. They inform me [of] what is going on, especially in lectures. [Participant 6]

Bad academic relationships

One student mentioned that her relationship with a student with a visual disability was not good because it was hard for her to converse directly with him unless she had an interpreter. She added:

> This means that I cannot discuss very sensitive issues, fearing the interpreter might leak the information. [Participant 5]

As to why relationships between them and students with other disabilities and those without disabilities were not good, participants revealed the following:

> There is some biasness towards us from students with other disabilities and those without disabilities, because, sometimes, they tell us that they feel those with hearing disabilities may want to depend on them. [Participant 2]

> Some students without disabilities still have negative attitudes towards us because they think we delay them and waste time during participation in group discussions and presentations. They take advantage of us due to our inability to hear. They backbite us. They can be talking freely and, when you look at them, they suddenly stop. Look the other way, [and] they laugh. I once caught one winking at others to stop talking when I looked in their direction, because they know I do lip-reading. [Participant 7]

> It is hard to socialise with them. They discriminate us due to lack of knowledge about sign language and deaf culture. [Participant 3]

The relationships between those with a hearing disability and lecturers were described as challenging. The following response captures their views:

> Lecturers do not know sign language. When there is no interpreter, I just sit in class without hearing any explanation. Also, lecturers can read very fast and make conceptualisation and copying notes very difficult for me. [Participant 1]

How the relationships were established and maintained

The participants had this to say:

> Being a student with [a] hearing disability made me build [a] strong love for fellow students with [a] hearing disability. The very popular ones exposed me [to], and involve[d] me in, different disability activities. I interacted well in class and was loyal to all students, and this built my social and academic network. [Participant 5]

> I gave love and care [to] other people with disabilities. I freely shared my feelings about our disabilities and how we manage them. [Participant 1]

> I build rapport to create friendships, which can permit one to open up and share, and this breaks [down] barriers. I maintain these relationships through text messaging [on] WhatsApp groups where we post social and academic stuff and social events that bring students with disabilities together. [Participant 2]

> I respect, and maintain good communication with, students with other categories of disability. [Participant 3]

> I joined the association for deaf students and another for all categories of PWDs at Kyambogo University. [Participant 8]

Some participants revealed that students with other disabilities helped them, because they appreciated the challenges of impairment. One remarked:

> Students with other disabilities are cooperative because we know we are one family of disability and depend on one another for support. For example, although I have [a] hearing disability, I may be a guide to a blind student. I can also push a wheelchair of a person with [a] physical disability. [Participant 2]

Proximity played a key role in establishing and maintaining academic relationships with students without disabilities, as suggested here:

> On most occasions, my proximity to certain students helps me build relationships. [Participant 2]

Another noted:

> Good interaction with those close to me when in class exposed me to the rest of the students and thus built my academic relationships. [Participant 5]

It is evident that, whereas they had only good relationships with fellow students with a hearing disability and with those with other disability types, their relationships with the non-disabled were largely unpleasant, although there were a few pleasant ones. Their relationships with their lecturers were not good. While good academic performance, the ability to use sign language, a knowledge of ICT, and support provided to each other made their relationships good, bias, negative attitudes and communication barriers were largely responsible for their bad relationships. The findings further suggest that love, care, exposure, interaction, sharing, respect for others, loyalty, building rapport, cooperation, dependability, the provision of assistance, and social media played a role in establishing and maintaining academic relationships.

The influence of academic relationships of students with a hearing disability on their learning

The findings show that academic relationships had both positive and negative influences on the students' learning.

Those who mentioned that they had good academic relationships with all categories of students were the ones who said that those relationships had positively influenced their learning. The following responses explain their opinions:

> The relationships with students with disabilit[ies] enable us to understand the Kyambogo Disability Policy and use it to advocate for our rights. [These relationships] have brought us together and bonded us[; thus] learning difficulties are shared …, strategies developed together and one voice raised as one family so that challenges are addressed by the university authorities. We have learned to relate with other impaired students [and have] understood their needs, and they have reciprocated by modifying the conditions to encourage hearing-impaired students to access learning materials and participate in learning activities. [Participant 7]

They help us to understand and embrace diversity among learners and prepare for ways in which to cater for that diversity. [Participant 2]

The effect of unpleasant academic relationships between them and those with other types of disability and those without disabilities were described by the majority as negatively influencing their learning. The reasons are expressed in the following responses:

> I am busy getting [the] interpreter's message and my brain is processing [it]; so it takes time for me to give feedback. Or I will give none, as others will have gone ahead. Even when students are [making] their contributions in class, following their discussion[s] through an interpreter has the same challenges. [Participant 8]

> Due to my limited sign-language skills and [a] lack of support from the non-disabled in class, I am constrained [when] making notes from lecturers' dictations. Most students without disabilities are very hostile and unfriendly to us and do not help us, thus limiting access to information during learning activities. All this negatively affects my learning. [Participant 5]

> We feel inferior and bad about ourselves when some students without disabilities sit very far from us. It makes us not to want to associate with the non-disabled students. [Participant 1]

Strategies for addressing barriers to good relationships and learning

The following responses reveal the strategies for addressing the barriers to good relationships and learning:

> As students with hearing impairment, sign language gives us our identity and breaks [down] barriers. For others, I use an interpreter to inform them that I will not be dependent on them. [Participant 2]

> I use SMS [Short Messaging Service], Facebook, [and] WhatsApp for communication and I stay positive about my impairment. [Participant 4]

> I always disclose my condition to them, thus making them know [the] best ways to communicate with me. They then provide a conducive and modified environment that enables me to interact with them effectively, especially during discussions and conversations. I am academically sound though my ears limit me [somewhat]. I also use counselling services in my hall. They advise me on challenges in life and how to overcome them. I don't use students because they hardly [ever] keep secrets and can make you a victim of rumours and gossip. [Participant 5]

> I usually go to my lecturers for guidance on how to handle social and academic challenges. [Participant 7]

> I go to friends for counselling. [Participant 8]

The findings suggest that the good academic relationships between the students with a hearing disability and non-disabled students had a positive influence on their learning, as they helped the students to understand and embrace diversity among learners and to prepare for ways to cater for that diversity. Such relationships facilitated access to lecture notes and other learning materials, improved group discussions, built their confidence, and enhanced their advocacy. They also promoted sharing and an understanding of their needs. All this contributed to improving their learning.

On the other hand, bad relationships were due to communication challenges, hostility and unfriendliness, negative attitudes towards them, and their feelings of inferiority. These constrained participation and made it difficult to process lecturers' messages. Mediation through sign language sometimes delayed or distorted messages, which also negatively affected their learning. The strategies to address some of the challenges included raising their voices while speaking to facilitate communication, using writing as opposed to speech during communication, and using text messaging and social platforms such as Facebook and WhatsApp. They also made use of counselling by counsellors, lecturers and fellow students, although they feared that students would not keep their secrets.

Discussion

The results show that students with a hearing disability were socially accepted (WHO, 2010b) and had academic relationships that enhanced their learning. Very few relationships did not. Moreover, the profiles of the participants reveal that they were adults from diverse social, cultural and religious backgrounds and that, increasingly, students with disabilities, including females, are entering university education despite the challenges doing so presents. The relationships between students with a hearing disability were good. Those with students with other types of disability were also good, but the relationships between them and the non-disabled were either unpleasant or complicated. This seems to confirm that there were considerable opportunities for relationships among persons with disability but few opportunities for relationships with those without disabilities (Nuwagaba, 2018:209).

The students with a hearing disability made decisions to establish relationships, used different ways to maintain them, and developed strategies to minimise the challenges to these relationships – a sign of self-directedness. This is consistent with Knowles' (1973) assumptions of andragogy which posit that, as adult learners grow and mature, their self-concept moves from dependency to self-directedness.

The relationships between students with a disability and their lecturers were affected by such students' personal attributes, attitudes and environmental factors, thus confirming that disability goes beyond centring on self – as suggested by the medical model, which locates disability in the person (Schneider, 2006) – to the self and the environment, as advocated by the social model (Oliver, 1996). The fact that the benefits of good relationships with other students with or without disabilities enhanced their learning resonates with Stinson and Walter (1997), who argue that having relationship skills helps to develop interdependence, which, in turn, promotes the successful completion of degrees. Lang, Stinson, Kavanagh, Liu and Basile (1999) confirm that academic interactions with peers and instructors affect learning. Since the academic relationships were enhancing their sharing and participation in learning with students with other types of disability and with those without disabilities, to the benefit of both, it can be argued that the relationships were helping to reduce their marginalisation and exclusion and were mutually beneficial. This contributes to social justice in participation, which relates to the ubuntu philosophy of not condoning injustice (Berghs, 2017). It also affirms its conceptualisation of education as a social learning activity (Wenger, 1998; Nuwagaba & Rule, 2016).

However, students with a hearing disability were faced with barriers while relating and learning. The complicated relationships were attributed to these barriers, including: the inherently negative attitude of such students towards themselves; their low self-esteem; a lack of social acceptance; their belief that they were unattractive or undesirable; hostility; discrimination; a lack of care; exclusion by students without a disability; communication barriers; and being considered slow learners by students with other types of disability and those without a disability. Such a combination of barriers augments the arguments of the

proponents of a social model of disability, who recognise both inherent and environmental factors as barriers that PWDs face (Oliver, 1996; Germon, 2000; Ndeezi, 2004; Nuwagaba & Rule, 2016). The continuing existence of barriers sheds light on the fact that, despite the favourable disability policy environment at Kyambogo University in particular, and in Uganda in general, the reality is that PWDs still face exclusion. In fact, Abimanya-Ochom and Mannan (2014) confirm that despite favourable policies, negative attitudes towards disability still prevail. This validates the argument that it is society that creates barriers for PWDs (Oliver, 1996; Ndeezi, 2004). Viewed in terms of the social model of disability, the environment in which they were operating, the attitudes of the non-disabled and the social world around them (Schneider, 2006) were discriminatory and disabling. Society labels them as technical and vocational education and training learners who are defined not by 'their capabilities and aspirations – but rather by what they appear to be deficient in' (Rudman & Meiring, 2018).

Sitting very close to the person lecturing, being attentive in class, receiving guidance and counselling, participating in various university activities, raising awareness about disability, and using ICT-reduced communication are likely to contribute to improved learning conditions. This affirms the potential of ICT for being conducive to establishing and maintaining relationships (Nuwagaba, 2018), as ICT provides convenient access to information that enhances social interactions, including how people relate socially and learn (Omede, 2014). The deliberate use of these technologies affirms their ability to make informed choices as adults (Knowles, 1973). Such strategies not only reduce barriers; they also build confidence.

Conclusion

From the results, it can be concluded that the students with a hearing disability in this study experienced good relationships both between themselves and fellow students with a hearing disability and between themselves and students with other types of disability. This was because they cooperated, provided support to each other, shared the challenges they faced, and developed strategies to overcome them together. The relationships were established and maintained through the use of sign language, text messaging, social media platforms, gestures and ICT. Proximity to each other also played a role in establishing and maintaining good relationships.

However, the relationships between themselves and students without disabilities were not good. This was because of negative attitudes, discrimination, inadequate and poor communication, and a fear that students with a hearing disability would be dependants and need support all the time. Moreover, their relationships with lecturers were not good due to a number of communication barriers.

The good academic relationships enhanced learning through the exchange of lecture notes, the sharing of ideas, having access to learning materials, and being supported in engaging in learning and other university activities. On the other hand, the bad and complicated relationships hindered learning.

By fostering an environment for enabling the establishment and development of good academic relationships, universities could go a long way towards enhancing participation in learning by students with a hearing disability and towards reducing barriers, thus promoting inclusion.

ACKNOWLEDGEMENTS

The research on which this article is based was supported by the NORHED Project at Kyambogo University. I also acknowledge the feedback from those entrusted with the blind peer reviews.

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THOUGHT PIECE

Navigating climate crises: Deepening the conversation about contributions of adult educators

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Background

At the conference, Access, barriers to participation and success for adult learners: Rethinking equity and social justice in post-school education, I presented one of the keynotes entitled, Adult learning and education in times of climate crises: Rethinking equity and social justice. The present thought piece extends some of the ideas which were presented and have been published in *JOVACET* (Walters, 2018).

In this thought piece, I continue to explore the questions relating to adult educators' roles and responsibilities in relation to climate crises and hope to provoke you to join this critically important conversation. The turbulence in the biosphere in which we live is shaping our lives in ever more dramatic and intimate ways, and these have profound implications for what we do to support adult learners, particularly keeping in mind the coordinates of access, equity and social justice.

Introduction

> It is worse, much worse, than you think. If your anxiety about global warming is dominated by fears of sea-level rise, you are barely scratching the surface of what terrors are possible. In California, wildfires now rage year-round, destroying thousands of homes. Across the USA, '500-year' storms pummel communities month after month, and floods displace tens of millions annually (Wallace-Wells, 2019: Inside cover).

Every day a new extreme weather event confronts us through the media. As adult learning and education (ALE) is often embedded in everyday life, I will start with contemporary stories from two different parts of the world.

Hurricane Maria struck Puerto Rico on 20 September 2017. It was the most intense tropical cyclone worldwide during that year and it caused catastrophic damage to the environment and a major humanitarian crisis, including destruction of roads, bridges, the electricity grid, water supplies, agriculture, and so on. There was major flooding and a lack of food, and housing was destroyed and businesses wiped out, together with the related jobs. Puerto Rico is in a hurricane zone – they know about them; they plan for them. But nothing they did helped them prepare for the vengeance of Hurricane Maria. The catastrophe was compounded by the slow relief processes and the disdain shown to Puerto Ricans by President Trump (Kolhatkar, 2019). Puerto Rico is a 'colony' of the United States, and, as with the 2005 Hurricane Katarina which devastated New Orleans and resulted in 1 833 deaths, the citizens, who are largely Hispanic or African-Americans, experienced a lack of urgency in the relief efforts to mitigate the devastation (Klein, 2018).

The second story is situated in southern Africa. On 14 March 2019, Cyclone Idai devastated central Mozambique, eastern Zimbabwe and southern Malawi. Catastrophic flooding killed more than 1 000 people in Mozambique, Zimbabwe and Malawi (Arndt, 2019; Fitchett, 2019). Officials warned that the toll was likely to be much higher once bodies were found when the flood waters receded. This was the worst cyclone to hit southern Africa in recorded history. The city of Beira had been 90% destroyed. Entire villages were wiped out. The cholera outbreak grew rapidly, with governments and aid agencies trying to contain it. Many health centres in the cyclone-affected communities had been swept away by flood waters, while the health centres run by relief agencies were barely enough to support thousands of displaced people. Months after the cyclone hit, many affected areas were still inaccessible by road, complicating relief efforts and further heightening the threat of infection due to water contamination. While various relief agencies did their utmost to help, there was limited financial aid or political will coming from the African Union, including the South African government, to support relief efforts. The South African National Defence Force budget had been slashed and citizens were preoccupied with, for example, electricity outages, national elections and other local concerns. This resulted in much more muted responses to the tragedies (Bloom, 2019).

Hurricane Maria and Cyclone Idai are just two of many contemporary examples around the world of climate turmoil and disasters. Both illustrate how people are left largely to fend for themselves in appalling conditions.

People of all ages and in all parts of the world have to learn to respond appropriately at times of crisis and, importantly, to mitigate the possibilities of, for example, increased floods, droughts and fires. The purpose of this thought piece is to suggest some ways in which adult educators can contribute to collective efforts at navigating climate crises. I begin by highlighting some pertinent aspects of 'climate crises'.

Climate crisis

There are growing numbers of scholars who, on the available evidence, are predicting the possibility of human extinction within this century (Scranton, 2015; Bendell, 2018; Selby & Kagawa, 2018).

Fossil fuels are heating the planet at a pace and scale never before experienced. Extreme weather patterns, rising sea levels and accelerating feedback loops are commonplace features of our lives. The number of environmental refugees is increasing and several island states and low-lying countries are vulnerable. Some argue that we are on an ecocidal path of species extinction. We are losing species 1 000 times more quickly than we have ever before (Johnson, 2019), and governments and the international platforms such as the United Nations Paris Climate Agreement deliver too little, too late – this is reinforced by the recent Intergovernmental Panel on Climate Change Report (IPCC, 2018). Most states continue on their carbon-intensive energy paths, with devastating results. There are growing numbers of environmental activist-scholars warning that political leaders across the world are failing to provide systemic solutions to the climate crisis – the private sector is both complicit and often inhibited by the current economic paradigm, and civil society is mostly too ill-equipped and uninformed to pressure for change. As highlighted previously (Walters, 2018), there are numbers of governments that deny the reality of accelerated climate change and continue to support fossil-fuel extraction and use.

A small number of countries have declared a 'climate emergency', but the Secretary-General of the United Nations (United Nations, 2019) states in his report on progress towards the Sustainable Development Goals (SDGs) that 'progress has been slow on many Goals, that the most vulnerable people and countries continue to suffer most, and that the global response thus far has not been ambitious enough'.

Linking climate crisis and 'othering'

Naomi Klein (2017b:35) presented the Edward Said Memorial Lecture in 2016. She made the compelling link between climate crises and 'othering'. She quoted from Edward Said's seminal work, *Orientalism*, where he describes 'othering' as 'disregarding, essentialising, denuding the

humanity of another culture, people or geographical region'. Once 'the other' has been firmly established, the ground is laid for any transgression, be it a terrorist attack, violent expulsion, land theft, occupation, or invasion – because the whole point of 'othering' is that the other does not have the same rights, the same humanity, as those making the distinction. What does this have to do with climate change? As Naomi Klein (2017a) argues, 'perhaps everything'. It also has everything to do with ALE.

Fossil fuels are not the sole driver of climate change – there is also industrial agriculture and deforestation – but they are the biggest. The thing about fossil fuels is that they are so inherently dirty and toxic that they require sacrificial people and places: people whose lungs and bodies can be sacrificed to work in the coal mines, and people whose lands and water can be sacrificed to open-pit mining and oil spills. According to Naomi Klein (2017b), as recently as the 1970s, scientists advising the United States government openly referred to certain parts of the country as 'national sacrifice areas'. As Naomi Klein argues, there must be theories of 'othering' to justify sacrificing an entire geography – theories about the people who live there being so poor and backward that their lives and culture do not deserve protection. Turning all that coal into electricity requires another layer of 'othering' too: this time for the urban neighbourhoods next door to the power plants and refineries. In southern Africa, North America and elsewhere, these are overwhelmingly communities of colour, forced to carry the toxic burden of the collective addiction to fossil fuels, with markedly higher rates of respiratory illnesses and cancers. It was in fights against this kind of 'environmental racism' that the climate justice movement arose.

According to Naomi Klein (2017b), fossil fuel 'sacrifice zones' dot the globe. This kind of resource extraction is a form of violence, because it does so much damage to the land and water that it brings about the end of a way of life, the death of cultures that are inseparable from the land, and the severing of indigenous people's connection to their culture. It is well known that these practices were enacted through colonisation and imperialism over centuries (Carpenter & Mojab, 2017). Fossil fuels require sacrifice zones: they always have. And you cannot have a system built on sacrificial places and sacrificial people unless intellectual theories that justify their sacrifice exist and persist, and refer to others as 'less than'.

Climate crises affect poor and marginalised people disproportionately, as seen in the two examples described earlier. This is unsurprising. The majority of people in the world are poor and they live on land that is least protected from extreme climate occurrences. They have few resources to mobilise in order to protect themselves. This is not to say that they do not do what they can under extreme conditions. However, they do not necessarily have sophisticated equipment for forewarning. nor are they able to mobilise resources quickly to escape the onslaught of extreme weather. It is also convenient for governments and corporations to focus on what individuals should do when it is they who must lead (Byskov, 2019). The media attention is also muted – such occurrences are away from the public gaze of international media hubs. For example, if there is a dramatic incident in Paris, France, in contrast to one in Beira in Mozambique, or in an urban centre like Cape Town, in contrast to a peripheral town like Beaufort West in South Africa, it is obvious which one will gain more coverage.

Climate injustice and inequity are the order of the day, and, while everyone is affected, the majority of people who bear the burden of these realities are people of colour and people who are poor.

How can adult educators help with navigating climate crises?

In this section, I expand on some of the issues raised previously (Walters, 2018): heartfelt pedagogies, active citizenship, challenging 'othering', deep adaptations, and lifelong learning orientations.

Heartfelt pedagogies

Climate crises are changing the world as we know it. They are systemic forces that threaten our collective and personal well-being. The changes are coming thick and fast and are creating a range of emotions, from uncertainty, fear and anger to denial and deep senses of loss. Leonie Joubert (2019) describes how climate activists are 'canaries in the coal mine of mental health decline'. She highlights how the medical community is giving unprecedented attention to the mental health fallout from the acute stress of surviving extreme weather events or the chronic distress of facing the existential threat of our own extinction.

The impact of the pervasive trauma and grief in communities affected by climate crises may be similar to other difficult circumstances of trauma, loss and violence of various kinds propelled by devastating economic, health or political conditions. As educators, we need to acknowledge the traumatic situations that many adult learners experience. I have written elsewhere (Ferris & Walters, 2012), in an HIV and AIDS context, that educators need to develop 'heartfelt pedagogy' as we design and facilitate interventions which take account of traumatic lived experiences. As the impact of climate crises intensifies, pedagogical approaches that acknowledge the trauma will be extremely important. These include a raft of methodologies that engage the whole person through embodied learning, including playfulness (Gordon, 2019), feminist pedagogies (Manicom & Walters, 2012), and mindfulness practices as elaborated on by Hamman in this journal.

Active citizenship

Climate crises raise many questions about natural resources and forms of energy. It is within entangled economic, political, social and cultural contexts that debate about climate change lives. The debates are highly charged politically and economically. It is therefore no wonder that governments or corporations do not necessarily want to encourage citizen participation – clandestine deals made in secret out of the public gaze are more common. We need to acknowledge that what we are required to do will not be approved of universally by the authorities – it sometimes requires subversion of the status quo. There are powerful people with vested interests who will do anything to continue to make a profit and will spread 'fake news' rather than confront the deep climate crises. It is therefore important that we as educators and

activists critically engage with and question what we are told so that we are more able to help our students and others to be curious and more sceptical of what appears in the popular media.

There is a well-known slogan among many of the social movements which proclaims, 'We don't need climate change, we need systems change.' This is recognition that it is the current economic system that is causing much of the problem. Therefore, if we as citizens and educators are to imagine an alternative economic system, fundamental questioning of contemporary taken-for-granted values and beliefs is required – this relates to what we eat, what we buy, how we live and what we value. Encouraging all people to recognise their own agency as active citizens is compelling: the climate crisis requires collective efforts by all sectors and levels of society to work and learn together if there is to be any chance of success. The issues are far too important to be left to politicians alone. As a poster at a recent climate change protest by scholars reads: 'There is no Planet B.' Adults who have been socialised into a world of consumerism and waste need to be open to learn from the children who are demonstrating a greater sense of urgency. As Greta Thurnberg (2018), the young Swedish climate activist, proclaims: 'We need to act with urgency, as if our house is burning!'

Others, like George Monbiot (2018), argue for a new politics in an age of crisis – one that encourages all citizens to participate actively in finding solutions. Educators and adult learners are also citizens – active citizenship is for everyone, and involvement in social movements, as we did in the struggle against apartheid in South Africa or through forms of community-based participatory research, are important responses.

Challenging 'othering'

A critical aspect of a lifelong learning (LLL) orientation across all generations is the challenging of 'othering' – be it based on gender, 'race', ethnicity, class, language, religion, age, geography or ability. Building tolerance, mutual respect, compassion and a sense of community is critical to challenging the strategy of 'divide and rule' that is so powerfully applied. As Wallerstein (2009) urges, we need to have at the forefront of our consciousness and our actions the struggle against the three fundamental inequalities of the world – gender, class and race/ethnicity/religion. The ways in which we confront such deep prejudices and discrimination within our society and ourselves call for life-deep learning ourselves and with others. This is central to a 'heartfelt pedagogy'. There are many examples of these through anti-racism education, feminist pedagogies and popular education, including through pedagogical responses to HIV and AIDS – we do not have to reinvent the wheel, as there are many radical traditions that can be drawn on in order to induct educators through professional-development programmes.

Deep adaptations

The innovative work of Jem Bendell (2018) is instructive when he argues for the deep adaptations that are required by all of us as citizens. He argues for processes which have

everything to do with us as educators: building resilience, relinquishment and restoration. He states, in summary:

(i) *Resilience:* '[This] is the process of adapting well in the face of adversity, trauma, tragedy, threats or significant sources of stress … [that is,] bounding back from the experiences' (American Psychological Association, as quoted by Bendell). The key question to ask is: *How do we keep what we really want to keep?*

(ii) *Relinquishment:* This involves people and communities letting go of certain assets, behaviours and beliefs where retaining them could make matters worse – for example, withdrawing from certain coastlines, shutting down vulnerable industrial facilities or giving up expectations of certain types of consumption. The key question is: *What do we need to let go of in order* ***not*** *to make matters worse?*

(iii) *Restoration:* This involves people and communities rediscovering attitudes and approaches to life and organisation that have been eroded – for instance, acknowledging different ways of knowing, changing diets back to matching seasons, re-wilding landscapes, rediscovering non-electronic powered forms of play, and increasing community-level productivity and support. The key question is: *What can we bring back to help us with the coming difficulties and tragedies?*

Accompanying accelerated climate change are inevitable experiences of loss. We need to come to terms with deep loss of what we care about and value. We therefore need to embrace grieving as part of living. In many cultures, this does not happen; therefore, learning from those who do integrate bereavement into their lives more easily would be a place to turn to. This raises the question of which and whose knowledge counts at times of climate crisis.

It is poor, working-class and indigenous individuals and communities who often have the experiences and knowledge of how to respond to immediate crises. We do need to promote local indigenous knowledge and strategies, which show how populations living under multiple interrelated risks employ specific strategies for coping and recovery. Middle-class and wealthier people are more mobile and can often choose to leave and go elsewhere. Climate crises can invert who knows more when and where in order to deal with the situations. The knowledge and strategies of many indigenous peoples around the world about how to live in harmony with Mother Earth are sorely needed. Climate crises can invert where expertise and deep knowledge lie. It is up to educators to help broaden what is considered as 'really useful knowledge' and ensure that the knowledge hierarchies that currently exist are challenged.

Lifelong learning orientations

All of the above point to LLL orientations and approaches being fundamental to responding to the deep adaptations that climate crises demand. People of *all ages* are affected: from birth to death. From birth, we are required to learn respectful relations to water and all natural

resources, and to respect the diversity of fauna and flora and all living things, as being crucial to our collective survival. Capitalism thrives on rampant consumerism and waste, whereas what is needed is an attitude of conservation, preservation and appreciation of the finiteness of the planet.

If we accept Naomi Klein's (2014) argument that the climate crisis is a confrontation between capitalism and the planet, then virtually everything as we know it has to be rethought and relearnt. We are challenged personally and collectively to rethink how we live, what we value and what we stand for. It demands that we have concern for those with little or no voice in governance, the poor and the unborn. It calls for new and imaginative thinking across all spheres of economic, social, environmental and cultural life, including in education.

An LLL orientation has implications for the diffuse learning environments of home, work, the media, and society in general. It is also important to have the infrastructure, through the media, ICT and systems of education and training institutions, to be able to communicate with, and engage, citizens when crises arise. The inculcation of an approach to learning throughout life, which encourages all people to remain curious and creative, will support society's abilities to take on the environmental challenges as they manifest themselves across different social classes, cultures, beliefs and traditions.

Building resilience through an LLL orientation across all generations at personal, organisational, community and societal levels should help our collective abilities to respond. Taking the use, preservation and conservation of water as an example, across all spheres and stages of life, when severe droughts set in, society is more able to adapt and respond appropriately when all of society has an understanding of the finiteness of water.

As rapid climate change can be turbulent, we do not know what is coming at us, so we do need to be open to learning and adapting fast. The role-modelling of education and training institutions in school and post-school education and training systems is vitally important to demonstrating the values for a resilient future – for example, including: the reuse of water, recycling, avoiding the use of plastics, and the use of renewable energy; valuing, conserving, preserving and reusing as important values in every aspect of institutional life; maximising land for food production; building capacities for disaster mitigation; deepening understanding of the dramatic changes in the biosphere; encouraging sustainable innovations to respond to climate crises with the long-term future in mind; and applying heartfelt pedagogies to LLL orientations and approaches.

The curricula in all education and training institutions, and in other learning spaces such as the home, work and cultural centres, and through the media, would do well to learn from the holistic approaches to education and learning of many indigenous peoples around the world who live the interconnections among all life forms, including Mother Earth (Solon, 2018).

Concluding thoughts

The climate crisis raises fundamental questions about the kind of economic and political futures that are possible if life on the planet is to be sustained and/or regenerated. As Naomi Klein (2017a) argues, there are urgent choices to be made to avoid catastrophic climate disruption, which includes changing just about everything about the economy as we currently know it. There are growing numbers of scholars, activists, politicians and educators who are putting forward ideas for alternative futures: Fioramonti (2018) describes the 'well-being economy' as one such example.

Wallace-Wells (2019) argues that it is time both to resist that which is compounding the climate crisis today and also to dream and imagine alternative futures. Adult learning and education have vital roles to play in both – but these are not neutral or technical undertakings. They involve thinking politically as we teach/learn and organise so that we can become climate crisis-resilient.

I have argued that adult educators and adult learners are also citizens. Our identities as citizens merge with our identities as educators and learners. As in other political struggles, such as those of the anti-apartheid movement and the mobilisation for access to anti-retroviral medication at the height of the HIV and AIDS pandemic, educators and students were in many instances allies fighting for social and economic justice. Pedagogies and curricula were shaped very much by these struggles. At this time of massive threat to life as we know it, it is time to draw on past experience in order to act with even more urgency. The climate crises demand that scholars and practitioners work across disciplines to address many of the intractable problems. It is clear that we need a range of adaptive skills, expertise and commitments, all enhanced through processes of learning. Adult educators, and all other educators in post-school education and training, have extremely important roles to play – both as citizens and in their professional capacities – to act urgently 'as if our houses are on fire'!

Treat the earth well. It was not given to you by your parents. It was loaned to you by your children (Native American proverb).

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JOVACET Special Edition

VOLUME 3, ISSUE 1, 2020

You are invited to submit an abstract for JOVACET Volume 3, Issue 1, 2020, which will be a Special Edition with a specific focus on teacher education in technical and vocational education and training, to be published in September 2020.

Deadline for abstract submissions: **Friday, 14 February 2020**.

Abstracts should comprise a maximum of 700 words and be submitted in MS Word format via the journal website at www.jovacet.co.za or emailed to Dr Catherine Robertson at cathy@tcrobertson.co.za. Should you prefer to submit a full article, please limit the number of words to 8 000. The website will provide the style guide, which includes the abstract and list of references, or they can be provided by emailing Catherine Robertson.

This Special Edition will focus on the theme of *Professionalising technical and vocational education and training (TVET) teacher education*, outlined below. Contributors may share any recent research relevant to the theme and the TVET/adult learning sector. Therefore, submissions of abstracts or full articles are invited that respond to this call to share recent research, its conceptual framing and its findings, with a view to identifying areas of further research for exploration.

An element of vocational teacher education which has periodically surfaced since the 1990s, is the currency of skills and knowledge relative to industry requirements. For policy-makers, captains of industry and collaborating vocational higher educational institutions, industry experience is currently a prerequisite for effective vocational teaching. The value of industry

placements for individuals and organisations is commonly emphasised. As with other professions, continuous professional development (or CPD) in the form of teacher in-service programmes is ongoing, and forms an essential component of teacher development.

Industry placement is an international trend 'towards professionalising the VET teaching workforce as many countries try to increase the qualifications of the VET workforce and introduce CPD for teachers and trainers' (Wheelahan & Moodie, 2012:15–16). For critics, however, the argument with regard to industry currency is perceived as a tool of neo-liberal capitalism that contributes towards the subordination of the academic enterprise to business and the state. This subordination, or industry involvement of lecturer staff, 'has come to be justified largely in terms of economic growth and preparing students for the labour market' (Badat, 2009: 3). In some circles, industry involvement is perceived as a direct contradiction to the historical purpose of higher education. Industry involvement and demands on higher education, it is argued, could thus be detrimental to higher education in general and to students in particular.

Policy frameworks for lecturers in both technical and vocational education and training (TVET) and adult and community education and training (ACET), promulgated in South Africa in 2013 and 2015, require the placement at potential employers as a formal element of initial teacher education programmes for these types of teacher in South Africa. The introduction of the policy frameworks has resulted in the development of new teacher education programmes in the country and lively debates related to it.

Submissions should be of high quality and follow academic research/writing conventions in the social sciences. Specifications can be found on the JOVACET website or obtained from Dr Catherine Robertson at the email address above.

We look forward to receiving your submissions for the Special Issue in 2020!

CALL FOR PAPERS

JOVACET

VOLUME 3, ISSUE 2, 2020

You are invited to submit an abstract or an article for JOVACET Volume 3, Issue 2, 2020, an edition with a general focus on research in post-schooling, either within the technical and vocational education and training (TVET) contexts, but also on the intersections of TVET with broader adult and continuing education and higher education contexts, to be published in November 2020.

Deadline for abstract submissions: Friday, 27 March 2020.

Abstracts should comprise a maximum of 700 words and be submitted in MS Word format via the journal website at www.jovacet.co.za or emailed to Dr Catherine Robertson at cathy@tcrobertson.co.za. Should you prefer to submit a full article, please limit the number of words to 8 000. The website will provide the style guide, which includes the abstract and list of references.

This second issue of the journal in 2020 will follow the broader theme of *Research in the field of TVET and in adult and continuing education and training*. Contributors may therefore share any recent research relevant to the theme and the TVET/adult learning sector. Abstracts or articles are invited that respond to this call to share recent research, its conceptual framing and its findings, with a view to identifying areas of further research for exploration. Submissions should be of high quality and follow academic research/writing conventions in the social sciences. Specifications can be found on the JOVACET website or obtained from Dr Catherine Robertson at the email address above.

We look forward to receiving your submissions!

FORTHCOMING EVENTS

1) CONFERENCE: POSTGRADUATE STUDENTS IN TVET STUDIES

The Editor-in-Chief of JOVACET and NRF Chair: TVET Studies, Prof. Joy Papier, is hosting a conference for Master's and Doctoral students in TVET-focused studies, **to be held at UWC, from 20–22 November 2019. Venue: School of Public Health**

The purpose of the conference is two-fold:

(1) to enable postgraduate students in this growing research area to share their work - particularly the scope of their studies; and,
(2) to work towards establishing a local community of TVET researchers/scholars who can support and inform one another's work, with a view to future publications in JOVACET and elsewhere.

Students are asked to make a very short presentation by way of an A3 poster, or, alternatively, a maximum of 5 power-point slides which will allow them to speak cogently (in 5–6 minutes) about their postgraduate study.

This conference is aimed, first and foremost, at the TVET community of postgraduate researchers, but we would welcome established scholars in TVET who can act as a sounding board for student presentations. Postgraduate students will benefit from these exchanges and from interactions with their peers.

Attendance of the conference is **free** and will **include catering** during the conference.

2) 'WRITING FOR PUBLICATION' SEMINAR

Prof. Simon McGrath (Nottingham University), author of a number of TVET-focused books and articles, a member of the JOVACET Editorial Committee and Extraordinary Professor to the IPSS, will facilitate a '**writing for publication' seminar** for prospective JOVACET authors, **on 22 November 2019 from 09:00 to 12:00**, as part of the conference programme mentioned above.

Please confirm in writing your participation in both the TVET Postgraduate Conference and the Writing Workshop by 31 October, as places are limited.

Email Lydia Steer (lsteer@uwc.ac.za) **or Jamey Santon** (jsanton@uwc.ac.za)**.**

3) NEXT JOURNAL WRITING WORKSHOP

A writing workshop for prospective JOVACET authors, **who have papers already in draft**, will be held in February/March 2020. Details to be advised in due course. Kindly indicate your interest in this by **emailing Dr Cathy Robertson** (cathy@tcrobertson.co.za) before 31 October 2019.

THE JOURNAL OF VOCATIONAL, ADULT AND CONTINUING EDUCATION AND TRAINING

The Journal of Vocational, Adult and Continuing Education and Training (JOVACET) recognises the need for critical engagement through studies in technical and vocational education and training (TVET) and adult and continuing education and training, and for encouraging critical scrutiny of this expansive knowledge area on the African continent.

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