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The voices of disadvantaged scholarship recipient learners in affluent independent high schools

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THE VOICES OF DISADVANTAGED SCHOLARSHIP RECIPIENT LEARNERS IN AFFLUENT INDEPENDENT HIGH SCHOOLS

by

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ABSTRACT

In an attempt to promote inclusion and to improve educational outcomes, many affluent independent high schools in South Africa offer scholarships to talented and deserving learners from economically disadvantaged backgrounds. It is often assumed that learners selected for "inclusion" in these schools benefit greatly from such an opportunity, yet the voices of these scholarship recipients are seldom heard. In this qualitative study, grounded in the methodology of phenomenography, a multimodal approach was adopted to listen to the voices of the participants, so as to obtain information-rich data. By listening to the experiences of the learner participants in a study that was framed by the concept of 'voice research', it was found that while the learners are grateful for the opportunity to attend affluent independent high schools, they are also aware of the limits of benevolence[1]. When learners' perceptions regarding their access to such independent schools were explored, it was found that learners believed that they were deserving of their scholarships, based on their proven academic performance and diligence and the potential that they showed. It was also found that learners' full participation in the academic, sporting and social life of the school was constrained by their economic disadvantage. With reference to the findings in the literature and the voices of the participants in the study, it can be asserted that while such scholarship programmes offer many advantages, they also have limitations, which need to be addressed at an individual level.

KEY WORDS:

inclusive education, inclusion/exclusion, marginalisation, scholarship programme, independent education, disadvantaged learners, benevolence, voice research

Note

[1] Benevolence refers to the moral obligation to help those less fortunate.

DECLARATION

I, Kelly Geyer, hereby declare that the work contained in this research report is entirely my own unaided work. It has been submitted exclusively to the University of the Witwatersrand in partial fulfilment of the requirements for the degree of Master of Education. It has not been submitted for any other degree or examination at any other university.

_____

Kelly Geyer

Signed on this _____ day of _____ 2014

NOTE:

A journal article based on this research report has been accepted for publication in the *South African Journal of Higher Education* in 2015, volume 29(1).

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LIST OF ABBREVIATIONS

CSI	-	corporate social investment
DBE	-	Department of Basic Education
DoE	-	Department of Education
EFA	-	Education for All
IEB	-	Independent Examinations Board
ISASA	-	Independent Schools Association of Southern Africa
NPC	-	non-profit company
SSP	-	Student Sponsorship Programme
UNCRC	-	United Nations Convention on the Rights of the Child
WP6	-	White Paper 6

CHAPTER 1
INTRODUCTION AND BACKGROUND

1.1 BACKGROUND TO THE STUDY

"There is a song by Nickelback that says 'What is worth the prize is worth the fight'. And I believe that the prize of inclusion is definitely worth the fight."

These are the proud words of Michaela Mycroft, aged 17, after being awarded the 2011 Children's Peace Prize for her commitment to the rights of children with disabilities in South Africa.

The rights of children with disabilities are consistent with the initiative of inclusive education, which aims to include children with disabilities in "mainstream" society, where they are not labelled or categorised as being different. For this reason, inclusive education has become something of an "international and national buzzword" (Swart & Pettipher, 2005, p. 3), with numerous definitions having been put forward of what it entails, depending on the context. What counts as inclusive education varies across countries. Inclusive education can therefore be seen as a shifting concept that is contextually determined, with no real international standard or goal. In South Africa, "inclusive education has its origins from a rights perspective informed by liberal, critical and progressive democratic thought" (Engelbrecht, 1999, p. 7). However, regardless of the context, the ideals of inclusive education are linked to human rights and social justice, and therefore the Constitution of South Africa may be of importance if we aim to achieve the goals of inclusion. According to the Constitution of the Republic of South Africa, Act 108 of 1996, the terms "equality" and "education" both form part of our human rights agenda. With regard to the right to equality, the Constitution states that "the state and no person may unfairly discriminate directly or indirectly against anyone on one or more grounds, including race, gender, sex, age, disability" and other grounds, which are mentioned (RSA, 1996, Section 9). The Constitution further states that "everyone has the right to a basic education" (RSA, 1996, Section 29). In linking these human rights to inclusive education, it is ideal and constitutional that "every person shall have the right to a basic education and equal access to educational institutions" (Naicker, 1999, p. 15).

The Salamanca Statement, adopted by the World Conference on Special Education in Spain in 1994, “recognises the necessity and urgency of providing education for children, youth and adults with special educational needs within the regular education system” (UNESCO, 1994, p. viii). However, despite the general focus of inclusive education concerning learners with disability, this research aims to move beyond disability to understand inclusion more broadly. A broad definition of inclusion focuses on the diversity of learners and how “circumstantial problems” such as marginalisation, underachievement, and, more specifically, low economic status and lack of privilege affect learners’ ability to gain equal access to mainstream education (Weeks, 2000). Inclusive education can also be seen as the process of including learners with academic potential in schools where their families are unable to afford the fees.

Independent schools, otherwise referred to as “private schools”, are a worldwide phenomenon. The aim of these schools is to provide an alternative to state-funded and state-controlled education. However, equal access to independent institutions is not always possible. The inability of some learners to gain access to independent schools is caused by the higher fees that these schools charge and the state-of-the-art facilities that these schools have, which makes it almost impossible for children from lower-income families to gain access. South Africa’s Constitution affirms the right of independent schools to exist, provided they do not discriminate in their admission on the grounds of race and that they do not offer an education that is inferior to public education (RSA, 1996, Section 29(3)). Despite these provisions, it can be argued that independent schools do discriminate against learners who are economically challenged and are unable to pay the exorbitant school fees that these schools charge. Learners are then left with no other option but to attend their local government school, which may be under-resourced and underperforming.

Based on the limited access that learners from lower-income families have to affluent schools, independent schools in South Africa have over the years been offering financial assistance (scholarships) to enable learners from previously disadvantaged groups and learners from low economic backgrounds to attend these schools. Learners are often selected based on academic potential and are granted access to an independent education, which their families otherwise could not afford. Companies frequently award scholarships to learners as part of the company’s social investment initiative, in which a percentage of their dividend is allocated to what is known as a corporate social investment

(CSI). In the past, the Student Sponsorship Programme (SSP) or the school itself has also been known to provide learners with scholarships. The SSP or the school covers the learner's tuition fees, buys their books and uniform, and provides boarding facilities for the full five years of their secondary schooling. These acts of benevolence, the moral obligation to help those who are economically challenged, can be seen as a step towards a more prosperous and inclusive society, and are often expected to be met with gratitude. However, the response to these benevolent acts may be the opposite of what was expected. Slee (2011, p. 107) argues that inclusion "is not achieved through charitable dispensations to excluded minorities", and, although the initiative of having independent schools may be seen as an inclusionary practice, it needs to be established what it means to include.

Scholarship recipients from economically disadvantaged backgrounds are ultimately included to some extent, but it is possible that they are marginalised or excluded in some ways. Slee (2011, p. 107) refers to learners who experience marginalisation as occupying precarious positions as tenants on the social margin of schools and schooling. In the case of this research, where the focus is on the experiences of disadvantaged scholarship recipients, the "tenants" are the disadvantaged learners in affluent independent high schools. Despite the fact that scholarship recipients are included to some extent, it is possible that learners fear that they do not belong, and they may therefore be insecure about their place at school. Related to this, Sayed and Soudien (2005, p. 116) state that "inclusion invariably produces its own exclusion", and so, learners are included, only to be excluded in other ways.

It is because of the possible underlying and neglected experiences of learners that 'voice research' has come to provide a significant way of uncovering the various different "silent" forms of exclusion. As a result, there has been a considerable shift from research "on" children to research "with" children. Tangen (2009), as cited in Messiou (2011, p. 10), argues that "engaging with students' voices can make a powerful contribution to developing a better understanding of how equality, inclusion and quality of school life can be achieved". This highlights the importance of listening to the voices of these learners in order to establish what can be done to make their academic and social experiences more positive. Tangen (2009), as cited in Messiou (2011, p. 10), asserts further that "listening to children in relation to inclusion is, in itself, a manifestation of being inclusive". Inclusion refers to ways in which schools can reduce barriers to participation and learning for all

pupils who are at risk of being marginalised and excluded (Farrell, 2004, p. 16). Listening to the voices of children and young people could then possibly alleviate learners' experiences of marginalisation and exclusion.

1.2 PROBLEM STATEMENT

It was upon hearing a story of a disadvantaged learner in an affluent independent school who stole a cell phone and justified his actions by saying that he "just wanted to know what it felt like to have a phone" that I became interested in researching the topic of disadvantaged learners in affluent independent schools. It became evident to me that little is known about the lived experiences of learners from economically challenged backgrounds that attend affluent independent schools.

The voices of children and young people concerning broader issues of inclusion are often silenced, and there is consequently a lack of knowledge regarding the experiences of marginalised learners and how they feel. It was only in March 2012 that research on "the challenges and opportunities that previously disadvantaged black scholarship and bursary learners experience within independent schools" was published electronically (Simpson, 2012). Internationally, studies have touched on related issues. For instance, a study by Horvart and Antonio (1999) investigated the experiences of African American high school seniors who attended a predominantly white elite independent secondary school. Kuriloff and Reichert (2003), in their study, explored the ways that boys from diverse backgrounds manage in an elite boys' school. Despite the fact that these studies touched on related issues, there is limited knowledge and understanding of the experiences of disadvantaged learners in affluent schools, and this is an issue that requires further research.

For this reason, this research focuses on the voice of disadvantaged learners who have received scholarships to attend affluent independent high schools, with specific reference to the region of Johannesburg. Listening to the voices of a small group of learners from affluent independent schools foregrounds the importance of understanding an initiative that seeks to break the cycle of poor educational outcomes and poverty associated with underperforming schools. This study is thus interested in how learners' experiences can be interpreted in addressing inequitable educational outcomes in the Johannesburg region.

1.3 AIM OF THE STUDY

The aim of the study is to address the knowledge gap and to listen to the voices of disadvantaged learners and their experiences of attending affluent independent high schools after receiving a scholarship. The study intends to generate findings that could possibly lead to a broader understanding of inclusion, and possibly better inclusive practices.

1.4 RESEARCH QUESTIONS

The research question of this study is "What are the experiences and perceptions of disadvantaged learners who attend affluent independent high schools after having received a scholarship?"

Sub-questions

The sub-questions of this study are as follows:

- What are the learners' perceptions regarding having been given a scholarship?
- How do these learners perceive their school experience as being similar to or different from the experience of their affluent peers?
- To what extent do these learners experience inclusion or exclusion and marginalisation?

1.5 RESEARCH METHODOLOGY

This research follows a qualitative approach with a phenomenographic research design. In an attempt to achieve the aim of the study, participants were purposefully selected based on three criteria: they had to come from a disadvantaged background, they had to be a scholarship recipient, and they had to attend an affluent independent high school. In order to answer the research question and gather information-rich data, a multimodal approach to data collection was used. Individual interviews were the main method used to gather data. In addition to the semi-structured individual interview, "photo diaries" and the "message in a bottle" technique were used to elicit further interview questions. As an alternative to oral responses, learners were given a journal to write about their experiences. The advantage of using a multimodal approach is that it allows participants to express themselves in ways that they feel most comfortable with. The data-collection

methods and instruments, as well as their respective advantages and limitations, are elaborated on in Chapter 3.

1.6 CLARIFICATION OF RELEVANT TERMS

Due to the nature of the study, the following terms are of importance in that they are highly contested notions within the field of inclusive education and in relation to the current research topic.

1.6.1 Inclusive education

In broadly defining inclusive education, it is essential that one understands that inclusion does not only concern learners or children who are defined as having special needs. Inclusive education is far broader than that, and for the purposes of this research, the study of inclusion will be concerned with any learner who may possibly experience any form of exclusion or marginalisation. As Ainscow (2000), as cited in Messiou (2006, p. 307), states, “focusing only on special needs is limiting as an agenda, since other factors that might bear on children’s participation might be overlooked”.

1.6.2 Disadvantaged learners

Disadvantaged learners are often referred to as learners who come from historically disadvantaged or low socio-economic backgrounds, and whose parents lack the financial means to adequately support them. Due to the history of apartheid within South Africa, historical and economic disadvantage are often closely linked with 14 out of 16 learners both historically and economically disadvantaged. For the purposes of this study, the term “disadvantaged learners” refers to learners who come from low-income families, across race, gender, culture and religion, where there are no or limited finances to pay school fees, and the learners can therefore only attend those public schools, where payment of school fees is not required, or the fees are otherwise minimal.

1.6.3 Bursary versus scholarship

A bursary or a scholarship is the financial assistance that learners are given to enable them to attend a school with fees their family would otherwise not be able to afford. A bursary or scholarship covers all expenses relating to tuition fees, stationery, hostel fees, and perhaps other academic expenses that may arise. Learners are often awarded a

scholarship on account of academic or sporting excellence and their ability to perform well, irrespective of their financial need. A bursary generally offers the same financial support as a scholarship; however, it requires some evidence of financial need from the applicant. Much consideration was given to the ways in which the learners who participated in the study were referred to. Initially, the research referred to bursary recipient learners, as evident in all documentation prior to data collection. However during the data-collection process, most learners were adamant that they had received a scholarship, not a bursary, and they wanted this to be emphasised. Learners were adamant that their talents and achievements, not their disadvantaged background, were the reason for their being given a place in the school. The term "scholarship" as used in this study denotes the financial assistance that participants receive.

1.6.3.1 Scholarship recipients

I did not want to refer to learners as "scholarship learners", as this would signify that their identity as learners was determined by their status as scholarship recipients, and this would "other" them. It is for this reason that I use the term "learners who are scholarship recipients" or "scholarship recipients". It is, however, acknowledged that it is not a perfect designation, as it positions the learners passively, when, in fact, they are exercising a significant amount of individual agency to navigate the challenges that they encounter.

1.6.4 Affluent independent schools

The South African definition of independent schools is a narrow one compared to the definition used in other developing countries, and "the term 'independent' school has come to replace 'private' in many parts of the country" (Hofmeyr & Lee, 2004, p. 144). Although some independent schools do receive subsidies from the local government, they do not rely exclusively on these for financing their operations. Independent schools are usually funded by school fees, investors, or elite corporations.

According to a snap survey conducted by *City Press*, school fees at the most expensive government school in Johannesburg will cost approximately R29,000 per annum (Masondo, 2012). Although the fees at some affluent independent schools are around R55,000 per annum with boarding fees amounting to about R39,000 per annum, there are many independent schools in Johannesburg with fees in excess of R85,000 per annum and boarding fees in excess of R70,000 per annum. For the purposes of this study, the

term “affluent schools” refers to schools with school fees in excess of R46,700, the highest fee bracket designated by the Independent Schools Association of Southern Africa (Hofmeyr, McCarthy, Oliphant, Schirmer & Bernstein, 2013). Due to the fact that these schools have such expensive fees, it allows them to be selective, which is why learners at these schools generally come from the elite and wealthy sectors of society. Despite this, there are many independent schools that would not be regarded as affluent (Hofmeyr & Lee, 2004).

1.6.5 Student Sponsorship Programme

The Student Sponsorship Programme (SSP) is a non-profit trust that provides education opportunities to talented South African students from low-income families to attend the best secondary schools in Gauteng and the Eastern Cape. The programme provides a five-year high school scholarship to academically distinguished students. Learners are selected in Grade 6 based on academic excellence, financial need, and leadership potential. The SSP provides learners with personal development needs, a mentorship programme, and leadership development. Through these development programmes, the SSP aims to develop “leaders for South Africa” who are committed to the creation of a non-racist, non-sexist, democratic, united, and prosperous South Africa (SSP, n.d.).

1.6.6 Marginalisation

Although there are different ways of conceptualising marginalisation, this research refers to marginalisation as the ways learners or groups of learners are perceived as different. Messiou (2006, p.306) refers to marginalisation as originating from the theory of the “marginal man”, which focuses on individuals and the personality traits that develop when individuals are placed between two entirely incompatible social positions. Marginalisation thus refers to how learners possibly perceive their experiences as exclusionary and how they therefore perceive themselves as marginalised, due to unequal access and opportunities. This research places its focus on learners’ possible experiences of marginalisation within an educational context.

1.7 OVERVIEW OF THE STUDY

Chapter 1: Introduction and background

This chapter provides a brief introduction and background to the study, highlighting the main aim of the study. The research question and the sub-questions are stated, leading to a brief overview of the research methodology that was used to answer the research questions. Thereafter, relevant terms used in the research report are clarified, so as to prevent any uncertainties or misconceptions regarding specific terms used.

Chapter 2: Literature review

This chapter reports on the relevant literature pertaining to inclusive education in South Africa and the contested definitions of inclusive education. In addition, independent education in South Africa, as well as inclusive and exclusive education and marginalisation, are explored and elaborated on. The chapter concludes with literature on voice research and the benefits of such research in conducting this study.

Chapter 3: Research methodology

This chapter identifies and discusses the methodology of phenomenography, with specific reference to the phenomenographic research design of this study. The multimodal methods of data collection used are discussed, as well as the criteria for participant selection and ethical considerations. Lastly, the chapter elaborates on the phenomenographic analysis of the data, concluding with issues of validity and reliability.

Chapter 4: Findings and discussion

This chapter reviews and discusses the collective meanings of the participants' responses.

Chapter 5: Summary, reflections, and conclusion

This chapter contains a reflection on and summary of the research report. It discusses the main findings from the interpreted data, as well as the strengths and limitations in the design and execution of the study. The chapter also explores possible recommendations for the field of inclusive education, before ending with the researcher's reflections and concluding remarks.

CHAPTER 2
LITERATURE REVIEW

2.1 INTRODUCTION

Despite inclusive education being something of an “international and national buzzword” (Swart & Pettipher, 2005, p. 3), with many positive outcomes, it is often vilified, because learners have been placed in situations where they are unable to learn effectively (Corbett, 2001), resulting in experiences of failure and misery. It is important to consider and determine why these negative experiences occur in certain instances, but do not occur in other instances. Since the implementation of White Paper 6 (WP6)(DoE, 2001) and other policy documents, a substantial amount of research regarding inclusive education has been conducted. Although some view the process of inclusive education as effective and positive for learners and teachers, there are findings that show that it is not quite as effective as we think or we would like it to be.

This chapter aims to explore inclusive education from a South African perspective. More importantly, it will look at contesting definitions of inclusive education, with the focus moving away from a narrow definition of inclusion to a definition that defines inclusion more broadly. Defining inclusive education more broadly allows researchers and teachers to include in the common mainstream system learners that have been marginalised due to circumstantial problems. In addition, independent education in South Africa is explored, together with the different arguments relating to inclusion, exclusion, and marginalisation, and the various conceptualisations of these three phenomena. Lastly, the chapter looks at how learners’ voices can provide valuable insights into their experiences and perceptions in a particular situation with the aim of providing more inclusive practices.

2.2 INCLUSIVE EDUCATION IN SOUTH AFRICA

South Africa, along with many other countries around the world, is moving away from an education system that promoted segregation and exclusion, to one that now promotes inclusion and accommodates all learners. Nevertheless, the country’s education system is “a sector where the ravages of apartheid remain most evident” (DoE, 2001, p. 9). Walton

(2013, p. 2) describes South Africa as “a country which tries to embrace inclusive education against a background of educational segregation and exclusion”, and therefore continually attempts to provide an inclusive education system that caters for all learners. In line with this, Bernstein (1996), as cited in Slee (2011, p. 107), states that “inclusion is a fundamental right and requirement for a democratic education”.

The espousal of these attitudes and practices to include all learners stems from the Salamanca Statement, adopted in 1994 by the World Conference on Special Education. The aim of the Salamanca Statement is to design and implement education systems and programmes that take into account the wide diversity of every child’s unique characteristics, interests, abilities, and learning needs. The Salamanca Statement articulates that “children with special educational needs must have access to regular schools” and that regular schools with an inclusive orientation are “the most effective means of combating discriminatory attitudes, […] building an inclusive society and achieving education for all” (UNESCO, 1994, pp. viii-ix).

Similarly, the Education WP6: Special Needs Education acknowledges the diversity of learners and their ability to learn by meeting the needs of all learners through “enabling education structures, systems and learning methodologies” (DoE, 2001, p. 6). Furthermore, it defines inclusive education as focusing on teaching and learning, “with the emphasis on the development of good teaching strategies that will be of benefit to all learners (p. 17). In addition to this, *Guidelines for inclusive teaching and learning* was formulated in 2010 to further support the principles laid out in the Salamanca Statement, as well as in the WP6. *Guidelines for inclusive teaching and learning* is in accordance with the WP6 and defines inclusive education as “[celebrating] diversity among our learners and [encouraging] the creation of welcoming cultures in schools”, thereby making all learners feel like they belong (DoE, 2010, p. 8).

Despite inclusive education discourse often having a special needs orientation, the Constitution of the Republic of South Africa emphasises non-discrimination. This enforces the idea of equal opportunities for all individuals, as set out in the WP6, and relates to issues of social justice. In emphasising the notion of non-discrimination, equal access to educational institutions regardless of ability needs to be enforced. In support of this, Artiles, Harris-Murri and Rostenberg (2006, p. 261) state that “inclusive education is needed as a means to achieve social justice”. Denying learners access is a form of social

exclusion, or a “species of injustice”, as Fraser (2010, p. 364) has described it. In opposition to viewing inclusive education as being primarily concerned with special education, it is essential that we view special education as being part of inclusive education, so as to promote social justice. Through this, we provide equal access and opportunities for all learners, regardless of whether or not they experience any educational barrier. In support of this, Sapon-Shevin (2003, p. 26) asserts that “if we embrace inclusion as a model of social justice, we can create a world fit for us all”.

With regard to South Africa and the implementation of inclusive education, the definitions of what inclusive education should entail, as well as the principles and guidelines set out in policy documents, are idealistic yet achievable, but whether South Africa is being successful in following through is a question for debate.

2.3 DEFINING INCLUSIVE EDUCATION

Inclusive education can be defined in a number of ways. This results in what Miles and Signal (2010) refer to as an aporia. It has also been referred to as a “dilemma of difference” (Dyson, 2001; Norwich, 1993, 1996, as cited in Terzi, 2008, p. 245). The aporia, or double contradictory imperative, argues between Education for All (EFA) and inclusion of a disability, in particular. Although EFA focuses on ensuring that every child and adult receives a basic education of a good quality, it has the tendency to overlook marginalised groups of children (Miles & Signal, 2010). This results in individual needs being neglected, and we potentially lose the particular and demanding needs of learners with disabilities. The other side of the debate focuses on inclusion of a disability, in particular. By focusing on a particular group of individuals for inclusion, we tend to miss and forget about all the other intersections of exclusion. This means that any reason other than disability that may require individual support may be neglected, which will result in exclusion or marginalisation.

In further exploring the definitions of inclusive education, Ainscow et al. (2006, p. 14) distinguish between “*descriptive*” definitions, which refer to current practices of inclusion and the various ways in which inclusion is used in practice, and “*prescriptive*” definitions of inclusion, which refer to the intentions that we have in using the concept, for both ourselves and others. Ainscow et al. (2006) also distinguish between “*broad*” and “*narrow*”

definitions, which raises an important awareness in the contestations of how inclusive education is defined. Often assumed to be an issue of special education, inclusive education is, in fact, more broadly concerned with reducing exclusion and increasing participation in schools and other educational institutions (Ainscow et al., 2006). Thus, a "broad" definition of inclusion "focuses on the diversity of students and how schools respond to the diversity", while a "narrow" definition of inclusion promotes the inclusion of specific groups of students, such as "disabled students and/or students with special education needs in 'mainstream' or 'regular' education". Lastly, there are "*fragmented*" definitions of inclusion, which include both narrow and broad definitions. Definitions are fragmented "when they break down the group that they refer to" (Armstrong, Armstrong & Spandagou, 2011, p. 31).

In line with the broad versus narrow definitions, Weeks (2000), as cited in Prinsloo (2001), discusses various forms of special educational needs. Weeks (2000) describes the various barriers to successful learning as "permanent shortcomings", which include sensory, physical, intellectual and multiple disability, "development problems", "learning problems", and "circumstantial problems". When we narrowly define inclusive education, then we focus on specific learning impairments, and consequently neglect to consider any barriers to learning which are related to the learner's environment or socio-economic status. We then potentially forget about circumstantial problems "which could prevent learners from having a fair chance to make a success of their school career", such as "low socio-economic status, culturally deprived learners, marginalised, underprivileged and low achieving learners" (Weeks, as cited in Prinsloo, 2001, p. 345). These circumstantial problems could lead to marginalisation, exclusion, or underachievement, as asserted by Ainscow and Miles (2009). In opposition to the narrow definition of inclusive education is the broad definition, which focuses on providing educational access for all learners without disaggregating according to identity markers.

Broadly defining inclusive education could result in a shift away from the "medical model of disability" to the "social model of disability". The medical model of disability focuses on the learner's disability or diagnosis, which results in exclusionary practices, as learners are labelled according to their impairment, rather than according to the actual needs of the learner. The social model of disability does not see the individual's disability as preventing them from participating in any situation, but rather sees factors such as exclusion and discrimination as disabling them and acting as barriers. Defining inclusion broadly links

closely to the social model of disability, as it focuses on factors unrelated to an individual's specific impairment or barrier to learning. It focuses on the way society is organised, and it aims to remove "societal or environmental barriers in order to facilitate the full development of the individual's social, physical, vocational and belief systems" (Uys, 2005, p. 406). It is for this reason that it is vital to define inclusive education more broadly, moving away from a definition that is specific to disabilities.

Despite the wide range of barriers experienced by learners, the focus tends to be on permanent shortcomings, developmental problems, and learning problems which relate to the narrow definition of inclusive education. This research, however, takes on a broad approach to inclusive education, as it moves away from the seemingly conventional understanding that inclusion involves including primarily learners with an educational barrier or disability into the mainstream schooling system. In support of this, Slee (2011, p. 155) makes an interesting analogy when he asserts that "inclusive education has become a Trojan horse", in that it has challenged education systems and schools to change for *all* learners, and not just for learners with disabilities. He argues that "inclusive education needs to be redefined so that it is decoupled from special education needs and is part of the motivation for general education reform" (p. 155, 171). Lewin (2009, p. 155) describes different "*zones of exclusion*", within which there are likely to be different patterns of access to education which offer insight into educational exclusion. Through Lewin's (2009) description of the "zones of exclusion", it is clear that poverty is significantly implicated in educational exclusion. Consistent with this, a study by Dieltiens and Meny-Gibert (2012), which investigated poverty, social exclusion, and school access in South Africa, found that "poverty remains a factor in school drop-out despite pro-poor policies to address barriers to access" (p. 140), as learners are continually faced with the cost of schooling, particularly the cost of school uniforms. As a result, it was found that "poverty creates barriers to access and school completion" (Dieltiens & Meny-Gibert, 2012, p. 140), resulting in many learners not being able to achieve a basic education.

By narrowly defining inclusive education, it may mean that learners who are underprivileged or disadvantaged or who come from low socio-economic backgrounds have the potential to experience some form of exclusion or marginalisation. Ultimately, a broad definition of inclusive education reinforces the idea that including learners is not and should not be related only to disability, but that it should go beyond that and look at all other possibilities where learners may experience forms of exclusion.

In further exploring the definitions of inclusive education, Ainscow and Miles (2009) highlight four key elements that can be used to guide policy in attempting to define inclusive education. One of the four elements is that of *inclusion being a process*. Ainscow and Miles (2009, p. 2) explain this element as follows: "[I]nclusion has to be seen as a never-ending search to find better ways of responding to diversity". This is one of the many definitions that could be critiqued, in that schools or departments of education could use this definition as an excuse for not being inclusive. In critiquing the process concept of inclusion, Walton and Lloyd (2011) view "inclusion as a process" as one of the many metaphors used for inclusive education in South Africa. This process/journey metaphor was found to be used "to justify exclusion while ostensibly showing a commitment to inclusion", and it could thus result in a "broad, diluted and very elastic notion of what inclusion is in practice" (Walton & Lloyd, 2011, pp. 16, 15). If inclusion is seen as a never-ending process, it raises the question of whether or not we can ever confidently say that we are fully inclusive.

The second key element that Ainscow and Miles (2009, p. 3) highlight is "*inclusion is concerned with the identification and removal of barriers*". Although this seems positive, it, too, can be critiqued, as this approach could be problematic. Schoepp (2005, p. 2) refers to a barrier as "any condition that makes it difficult to make progress or to achieve an object". Barriers are often categorised as intrinsic barriers and extrinsic barriers. Intrinsic barriers may refer to permanent shortcomings, learning problems, or developmental problems, as discussed in this section, which are inherent within the individual. The WP6 (2010, p. 7) identifies extrinsic barriers to learning which may not be possible to remove, such as poor teaching practices, an inflexible curriculum, inappropriate language, and a lack of communication and support services, to name a few. A problem arises with the "identification and removal of barriers" element when parents possibly misunderstand this definition as suggesting that their child can be "cured", and his or her barrier to learning can be permanently removed. This may result in parents having unrealistic expectations, thereby conveying inaccurate information about their child to the school and the teachers. Consequently, teachers have misconceptions about the learner and are not always able to cater for the learner's needs in the most appropriate and effective way possible. As is evident from the above, the identification of barriers to learning raises the question of whether disability classification is essential and serves any purpose in inclusive education.

With regard to learners having equal access to educational institutions, it can be argued that learner classification is not necessary and does not provide much value. Conversely, there is the argument that classification is necessary and valuable and that we categorise learners according to their impairment to more effectively cater for their particular needs. When we categorise learners like this, we place a lot more emphasis on their impairment, which accentuates their difference. Terzi (2008, p. 245) explains the tension between these two arguments as being a choice between "identifying learners' differences in order to secure appropriate provision, with the risk of labelling and discriminating, and accentuating learners' 'sameness' and offering common provision, with the risk of not paying due attention to their needs". The underlying argument then rests on whether it is completely necessary for learners to be diagnosed to get support. Support should automatically be given to all learners, regardless of their "diagnosis", impairment, or barrier to learning. Despite the fact that this research does not focus on classifying learners or on including learners with an impairment, the arguments relating to learner classification can be extended to include learners who are at risk of being marginalised. This will be discussed in section 2.5.2 below.

The third key element that Ainscow and Miles (2009) use in attempting to define inclusive education describes inclusion as being "*about presence, participation and achievement for all students*". This entails that learners be punctual and reliable, and that they be physically present in the classroom setting. Once this has been achieved, attention needs to be given to the learner's participation in class, and it must be ensured that adequate support is provided when needed. Through successful participation, the quality of the learner's experiences may improve, resulting in satisfactory achievement. Achievement refers to "outcomes of learning across the curriculum, not merely tests or exam results" (Ainscow & Miles, 2009, p. 3).

The final element that Ainscow and Miles (2009) use in defining inclusive education is "*inclusion involving particular emphasis on those groups of learners who may be at risk of marginalisation, exclusion or underachievement*". This element is relevant to this research study, in that it refers to learners who do not have a specific barrier to learning yet are potentially marginalised or excluded due to factors not related to their physical or intellectual abilities. This is in line with the broad definition of inclusion.

Because of the fact that the definitions of inclusive education are highly contested, South Africa has not been able to establish a common standard that is achievable by all. For example, Lewin (2009, p. 155) states that to include a learner in an "ineffective school with excessive class sizes, few teachers and no learning materials, where little is learned" may be viewed as educational access or inclusion to some. However, according to Lewin (2009, p. 155), "this is not meaningful access to education", and would not count for inclusive education. In attempting to understand educational access, Lewin (2009, p. 155) offers practical insight into educational exclusion by proposing a model of the "zones of exclusion from access" which limit learners from either physical or epistemological access. Based on this, it needs to be established that "inclusion is concerned with any kind of marginalisation that might be experienced by any child, regardless if this is perceived as being about notions of special educational needs or not" (Messiou, 2006, p. 306). Inclusive education therefore needs to find alternative ways for learners to be more fully included and needs to critically look at the "architecture" of schools and schooling to establish how exclusion is inherent in many of our current school arrangements (Slee, 2011, p. 171).

Based on the definitions of inclusive education given above, it is evident that there is a large body of knowledge, each with its own validity and contestations, and it is therefore not possible to offer a single definition of inclusive education. Furthermore, it is evident that there is no clear meaning of "inclusion", which perhaps "conveniently blurs the edges of social policy with a feel-good rhetoric that no one could be opposed to" (Armstrong et al., 2011, p. 30). In addition to this, it is important to acknowledge that although some learners are included, their inclusion may have caused other areas of exclusion, experienced either directly by themselves or by their peers. Sayed and Soudien (2005) and Armstrong et al. (2011) support this and state that inclusion and exclusion are interrelated processes, and that inclusion tends to produce its own exclusion. This idea should be in the foreground when we think about inclusion.

In light of the various definitions of inclusive education given above, it must be highlighted that access to educational institutions plays a vital role. Lewin (2009) proposed an expanded definition of educational access, which focuses on the quality of education in schools. Some considerations to ensure quality in schools are that schools should be safe and have acceptable facilities, staff, and resources, to name a few. Once access is achieved into an educational institution, then learner participation both within and outside

the classroom is encouraged. According to Booth and Ainscow (2002, p. 3), “inclusion begins as soon as the process of increasing participation has started”. Learner participation entails collaboration and learning alongside others in shared learning experiences. Developing inclusion therefore involves reducing exclusionary pressures, leaving learners with a sense of belonging. Based on the “*index of inclusion*” proposed by Booth and Ainscow (2002), it can be established that inclusive education is primarily concerned with issues of access, participation, and belonging.

2.4 INDEPENDENT EDUCATION IN SOUTH AFRICA

Independent (sometimes called “private”) education is a worldwide phenomenon, with recent statistics indicating that 3.8% of South African learners attend independent schools (DBE, 2013). There are usually two reasons for establishing independent schools. The first reason is to provide an alternative to state-funded and state-controlled education, and the second reason is to provide educational opportunities for learners who cannot access state education (Kitaev, 1999). South Africa has independent schools in both these categories. However, this research is more concerned with the first category. With some of these schools dating back a century or more, independent schools have been established to provide parents with alternatives to the language/racial/religious/curricular offerings of state education at the time. In his account of the history of independent schools in South Africa, Randall (1982) explains that good private secondary schools drew their pupils from a narrow sector. The schools were “selective, making use of entrance examinations, and they [were] expensive, with fees, including boarding, so that only the well-to-do [could] afford them” (Randall, 1982, p. 7).

More recently, South Africa’s Constitution affirms that independent schools have a right to exist, provided they are registered with the provincial department of education, they do not discriminate in admission on the grounds of race, and they do not offer an education that is inferior to public education (Republic of South Africa (RSA), 1996, section 29(3)). Recent statistics indicate that independent schools constitute approximately 5.7% of all schools in South Africa, and in 2011 it was established that Gauteng had 519 independent schools catering for approximately 207,883 learners, compared to 2,040 public schools catering for 1,814,167 learners (DBE, 2013, p. 4). For these independent schools, it is a prerequisite that they be registered with an independent schools association. The oldest and largest

such association in the Southern African region is the Independent Schools Association of Southern Africa (ISASA). ISASA, along with other independent schools associations, is a non-profit company (NPC), or company not for gain, which represents almost 700 independent schools in South Africa, Botswana, Swaziland, Namibia, and Angola, with over 154,000 learners attending ISASA-affiliated schools (ISASA, n.d.).

In terms of policy documents in South Africa, there is no mention in the WP6 of the role that ordinary independent schools will play in an inclusive education and training system. However, the Salamanca Statement exhorts government to plan to educate all persons "through both public and private schools" (UNESCO, 1994, p. 13). Walton, Nel, Hugo and Muller (2009) have identified a gap in research in inclusion in South Africa in the area of inclusive practice in the independent sector. It was for this reason, together with my initial interest as discussed in section 1.2 that research was conducted, namely to address this gap. The research found that inclusion, despite its demand on human and material resources, "is achievable in the South African context and that, by applying various inclusive practices, the support needs of learners who experience barriers to learning can be met in ordinary schools" (Walton et al., 2009, p. 123). What is, important to note, however, is that this study was more focused on learners who experience barriers to learning, and the ways that they are included in independent schools, and it does not necessarily address marginalised learners who experience circumstantial problems, and the ways that they are included in independent schools.

Many independent schools offer excellent facilities, and it is often assumed that they attract some of the best teachers. Considering the high fees that are charged to meet all the operating costs of the school, independent schools that are not subsidised by the government remain the preserve of the financial elite. As mentioned in Chapter 1, it has become increasingly common that independent schools provide disadvantaged or underprivileged learners who show academic promise scholarships to attend their school. In many cases, it is not the school that provides the financial assistance for these learners, but rather the Student Sponsorship Programme (SSP). The SSP identifies "high-potential" young people from disadvantaged backgrounds and circumstances and offers them the opportunity to realise their potential in educational centres of excellence during their senior school years (SSP, n.d.).

Selection criteria are widely acknowledged by scholarship programmes and are useful in ensuring that learners selected for receiving a scholarship will excel and fit well in the programme. However, the selection criterion used for the identification of these "high-potential" learners does pose some problems and concerns. Reeves, Mashiloane, Bowman, Richards and Koen (under review) discuss in depth the concerns associated with selecting learners, with specific reference to how learners are identified and talent is measured. One of the main concerns involves the question of whether selection criteria "should assess current or potential ability", but also "which abilities should be measured and how to measure them" (Reeves et al., under review, p. 6).

Talent is often referred to as an "outstanding mastery of systematically developed competencies (knowledge and skills)", resulting in that person being among the top 10% of their peers who are or have been active in that field (Gagné, 2011, p. 11). Reeves et al. (under review) argue that talent is an actual achievement as opposed to a potential performance, and that the way in which it is defined "has broad implications for the process of talent identification and development" (Richards, under review, p. 2). Consequently, when "high-potential" learners from disadvantaged backgrounds are selected, it is essential that the school and the SSP acknowledge the concerns around selecting learners. In an attempt to address these concerns, Conley (2007) suggests that in addition to academic abilities, current abilities that are good predictors of success, such as certain personality traits and environmental support, should also be measured. In supporting this, Richards (under review) argues that there needs to be a shift in viewing talent as innate, static, and determined by genetics towards notions that emphasise the environmental, multidimensional and contextual nature of talent. The environment and the context play a significant role in identifying academic talent, together with notions of disadvantage. Disadvantage, according to Richards (under review), refers to learners who do not have adequate access to quality education, which results in limited opportunity to develop their academic potential. In essence, when selecting learners, the criteria used should be flexible and inclusive, ensuring that personal qualities as well as academic abilities based on contextual factors are assessed (Powis, Hamilton & McManus, 2007).

The process of selecting previously disadvantaged learners for a scholarship reflects an individual's moral obligation to help those who are economically disadvantaged. This moral obligation, otherwise referred to as benevolence, is expected to be met with

gratitude, not critique, yet the consequences of benevolent acts may result in the opposite effect from what is intended (Stove, 2011).

2.5 NON-ACCESS TO AFFLUENT INDEPENDENT SCHOOLS

As discussed in the previous section, the selection criteria carried out by the SSP or the school itself may raise concern or questions, resulting in non-access to affluent independent schools for many "potential" talented learners. The concern raised in the previous section about disadvantaged learners not having adequate access to quality education results in many learners not standing "even the remotest chance of achieving up to near their potential" (Van der Westhuizen & Maree, 2006, p. 201). Underperforming schools that lack qualified teachers and staff and have poor schooling facilities promote barriers to talent development in the local context (Wallace & Adams, 1993).

Many talented learners may not be identified if scholarship programmes do not consider disadvantaged learners in underperforming schools when looking for learners eligible for selection.

Despite the above issues, learners enrolled in affluent schools through such scholarship programmes could be expected to enjoy significant benefits and educational advantages that their family otherwise would not be able to afford due to its socio-economic status. The scholarship which is awarded to learners is a five-year programme which incorporates extracurricular leadership and personal development activities and includes tuition, school uniforms, sports gear, books, and educational excursions or tours. Because of the programme and the fact that the learners will be attending an affluent independent school, these learners can expect social mobility (Randall, 1982), access to the cultural capital of the middle and upper classes, and preparation for higher education (ISASA, n.d.). Furthermore, the fact that some learners will write the National Senior Certificate examination which is set by the Independent Examinations Board (IEB) can potentially increase access to high-demand university courses, reduce university exclusion, and increase the likelihood of "on-time" throughput (Visser & Yeld, 2008).

2.6 INCLUSION, EXCLUSION, AND MARGINALISATION

2.6.1 INCLUSIVE/EXCLUSIVE EDUCATION

The efforts of affluent independent schools to provide the means for enrolment of selected learners who would otherwise be financially excluded can be regarded as an initiative towards inclusion. However, access to a school does not necessarily equal inclusion. Access, itself, is a complex concept, with Morrow (2007) suggesting a distinction between formal access (that is, admission to an educational institution) and epistemological access (that is, access to the institutional "goods", which, in the case of schooling, is knowledge). As stated in section 2.3, Lewin (2009, p. 151) has called for an expanded definition of educational access and has stated that "access should extend beyond higher enrolment rates to include attendance, achievement, and progression and completion at appropriate ages". By broadening the definition of educational access and improving access to education, the number of children who remain out of school due to poverty could potentially be reduced. Factors unrelated to poverty, such as access to safe schools with adequate staff and learning materials and other facilities, would then influence the number of learners not enrolled at school.

In addition to the above, access to the social environment, or informal school environment (Lahelma, 2004; Walton, 2013), is also important for learners. Inclusion must involve full participation and a feeling of belonging in the life of the school, not just accommodating or tolerating those who were previously excluded. However, implicit in attempts to acknowledge and remedy previous exclusion is the potential to further exclude or marginalise learners. Related to this, Slee (2011, p. 155) cautions that "while inclusive education sometimes describes genuine attempts to challenge the injustices in education, it can also be deployed to sustain these injustices". There are many ways that including previously disadvantaged learners in affluent schools by means of scholarships can sustain injustice. In the following paragraphs, three concerns are discussed, namely individualising solutions to systemic problems, clauses of conditionality, and the presumption of assimilation.

The first concern is the question of whether scholarship initiatives provide individual solutions for systemic problems. There are issues in basic education in South Africa which continue to be cause for anguish and despair. One of the major issues is the number of learners of compulsory school age who are not attending school. It was found in a study

by Fleisch, Shindler and Perry (2012, p. 529) that factors such as “disability, family structure, children living in households that are eligible for social grants but are not receiving them, and geographic and racial characteristics” may account for children not being in school. In the context of these challenges, scholarship programmes offer a select few learners the opportunity to escape the poor educational outcomes associated with underperforming schools. Nevertheless, however well-intentioned these initiatives are, and however beneficial they are for the few learners that are fortunate enough to benefit from them, they do not offer a solution for the schooling problems of those learners who remain behind. Dorling (2011, p. 34) contends that “elitism in education can be considered a new injustice”, and he criticises divisions in education that perpetuate social inequality and sustain the myth that “elitism is efficient”. It is for this reason that there are some uncomfortable though important questions that need to be asked about scholarship programmes in schools. These questions include the following: Do we not, in effect, further segregate and isolate schools by removing their top performers and concentrating them in already high-performing schools? How are school communities disrupted by the removal of those learners that are deemed talented (Sapon-Shevin, 1994)? Is equity served by providing access to elite spaces for only a few learners?

Botsis, Domingues-Whitehead and Liccardo (2013) discuss issues related to these questions and show how scholarship programmes at a university enable the institution to transform to become more racially and socio-economically diverse. Basically, the “elite” status and “excellence” of the university are not challenged due to the scholarship recipients being academically strong. A question that then arises relates to whether scholarship programmes should rather take in struggling learners and provide them with the benefits of the affluent school. Another question that needs to be asked about scholarship programmes is whether we should commend all efforts made to be more inclusive, however limited, on the rationale that some inclusion is better than none. In raising these questions I do not imply that scholarship recipients do not deserve a high-quality education, but rather that *all* learners deserve a high-quality education.

Secondly, issues related to the “clauses of conditionality” (Slee, 1996, p. 107) that are pervasive in inclusion efforts need to be highlighted. The term “clauses of conditionality” was coined by Slee to describe “escape clauses” where inclusion is deemed not viable (or inconvenient). So, for example, the requirement that schools make only “*reasonable* accommodations” for learners with disabilities absolves schools from having to do

whatever is necessary to become fully inclusive. Clauses of conditionality, in effect, make "included" learners perpetual guests in a school or education system. The impression created is that these learners do not belong to the school by right. Rather, continued enrolment for them is subject to certain conditions. In the case of learners in South Africa who experience barriers to learning, the condition of inclusion refers to a school's capacity to cater for the learners' needs (Walton & Lloyd, 2011). This is also a concern with scholarship programmes. Although previously disadvantaged learners are awarded scholarships to attend affluent independent schools, there may be explicit or implicit conditions to the awards. These academic, behavioural, sporting or other expectations make for a demanding stay at the school, as scholarship learners need to meet conditions to ensure their continued enrolment, which does not apply to their fee-paying peers.

The third concern, related to the second concern, discussed above, is whether scholarship programmes are not essentially assimilationist endeavours. In this regard, Slee (2011, p. 107) makes a powerful indictment against some inclusion efforts:

> *Inclusive education […] is not achieved through charitable dispensations to excluded minorities. It is not about the movement of people from their tenancy in the social margins into unchanging institutions. Integration requires the objects of policy to forget their former status as outsiders and fit comfortably into what remain deeply hostile institutional arrangements. There is an expectation that they will assume an invisible presence as they accept the dominant cultural order.*

Scholarship learners are essentially invited guests in affluent independent schools, which are steeped in particular colonial, religious and linguistic histories and traditions. While most schools have embraced the racial diversity of their learner population, many schools still have remnants of "little England on the veld" (Randall, 1982) in their school culture, religious traditions, uniform, and language of instruction. The scholarship recipient is expected to assume the status of grateful beneficiary of the host school's "hospitality", accept and internalise the dominant norms of the school, and make the necessary adjustments to "fit in". Such adjustments to "fit in" were reported in a study by Kuriloff and Reichert (2003, pp. 751, 756), where boys from diverse backgrounds that were attending elite schools in Philadelphia in the United States described the need to learn "a drill". This included acquiring discipline and self-control, working hard, having a will to win, a cool style, and self-knowledge as learners, as well as developing intrinsic motivation by cultivating a love for learning (Kuriloff & Reichert, 2003).

2.6.2 MARGINALISATION

From the above discussion and the contested definitions of inclusive education, it is evident that inclusive education can be more broadly defined, extending beyond learning or physical impairments. Marginalised learners should therefore have more influence on how inclusive education is defined and definitions of learners or groups of learners that are perceived as different.

In considering what constitutes marginalisation, Messiou (2006) conceptualised marginalisation in four ways, which provides clarification and allows a better understanding of learners' experiences and perceptions with regard to their possible exclusion. The four conceptualisations include: (i) when a child experiences some kind of marginalisation, and this is recognised by almost everybody, including the child himself or herself; (ii) when a child feels that he or she is experiencing marginalisation, but others do not recognise this; (iii) when a child is found in what appears to be marginalised situations but does not view this as marginalisation; and (iv) when a child appears to be experiencing marginalisation, but does not recognise this (Messiou, 2006, p. 305).

One of the four conceptualisations of marginalisation, as proposed by Messiou (2006), is illustrated in a study by Sookrajh, Gopal and Maharaj (2005, p. 2), who conducted research to "capture the possibilities and constraints that are experienced by a selected group of refugee learners, in a school in which these children find themselves". This relates to the problem and purpose statement of my research, in that my study looks at inclusion from a different perspective, which would not ordinarily be considered. As explained in section 2.3, inclusive education is not defined by whether learners experience "permanent shortcomings", "developmental problems", or "learning problems" (Prinsloo, 2001, p. 345), which are related to physical and intellectual disabilities. Inclusive education goes further than this and takes into account "circumstantial problems". In the study by Sookrajh et al. (2005, p. 6), it was found that although refugee learners were "supposedly included into the schooling system", they still felt excluded by the terminology used, curriculum issues, and physical alienation. This relates to Messiou's (2006, p. 310) second conceptualisation of marginalisation, namely "the child is feeling that he/she is experiencing marginalisation, whereas others do not recognise this". If the marginalisation of the refugee learners in the study by Sookrajh et al. (2005) had been recognised by others, particularly the teachers and principal, perhaps more could have been done to

minimise their exclusion. In the study by Sookrajh et al. (2005, p. 7), physical alienation, or being "physically separated from the other learners", along with cases of physical violence, was not evident only in the context of the school, but was also experienced from "local children not necessarily in school but out in the district". It was found that the refugee learners were attributed the label of "foreigners" or "refugees", and this resulted in their being marginalised by school principals, teachers, and peers based on their "status". Sookrajh et al. (2005, p. 11) found that "what is offered by the school is a strikingly conservative discourse of normalcy of inclusion, which abounds in notions of inclusion, but manifests itself as exclusionary practice".

In attempting to dismantle educational exclusion and marginalisation, it needs to be ensured that perceptions such as that of an Australian parent, as cited in Slee (2011), do not occur. This parent observed that inclusive education was "merely scraps from the table for children who, when all is said and done, are sometimes tolerated but never welcomed" (Slee, 2011, p. 43). The fundamental concern regarding this is that despite the view of some teachers that they are including by merely tolerating specific learners, Slee (2011) would argue that tolerating learners in an educational setting is to not include. This should be emphasised. Ultimately it can be said that the purpose of Slee's (2011, p. 153) proposition to reframe the field of inclusive education is to "identify and dismantle educational exclusion".

To be able to reduce learners' experience of marginalisation or educational exclusion, it is imperative that the lived experiences of learners be known. Although it is easy to discuss scholarship programmes in theory from a distance, and such programmes have often been either commended, questioned, or dismissed, not much is known about the lived experiences of learners from disadvantaged backgrounds who attend affluent independent schools. Slee (2011, p. 107) advises that in our pursuit of inclusion "we seek understandings of exclusion from the perspectives of those who are devalued and rendered marginal or surplus by the dominant culture of the regular school". In the following section, voice research is discussed as a framing idea for this study, which investigates the experiences of scholarship recipients in affluent independent schools.

2.7 LISTENING TO THE VOICES OF LEARNERS

According to Messiou (2008, p. 27), "[t]he idea of listening to children's voices in relation to matters that concern them" has been somewhat neglected, and it possibly still is. However, in recent years, more attention has been given to learners' voices, particularly since the adoption of the United Nations Convention on the Rights of the Child (UNCRC). The UNCRC was adopted in 1989 and is "the first legally binding international instrument to incorporate the full range of human rights for children – civil, cultural, economic, political and social" (Network of Community Activities, n.d.). Some of the core values of the convention are non-discrimination, dedication to the best interests of the child, and respect for the views of the child. The convention protects the right of children to attend school and to receive a basic education, but also to express their views in a safe environment, free from discrimination and judgemental attitudes. Motivated by the contents of the convention, researchers and teachers have found benefit in listening to the voices of learners and gaining insider perspectives of learners' experiences.

The voices and experiences of young people from marginalised groups in society have tended to be ignored, and these groups have been patronised in education decision-making processes (Rose and Shevlin, 2004). Voice research is a current topic and aims to provide a way in which learner experiences are considered in all contexts, with the hope of possibly creating a more inclusive environment. In line with this, Walton (2011, p. 89) states that research with children and young people in the context of inclusive education should "be constructed in such a way that the findings can lead to meaningful change or practical outcomes for all learners and especially those vulnerable to exclusion and marginalisation". Consistent with this, Messiou (2013) asserted that when we actively engage students in the research process, it will have a more powerful impact in attempting to address marginalisation in the school context.

Although voice research may reveal some promising insights into educational inclusion, exclusion and marginalisation, it has been criticised and contested. For example, Moore and Muller (1999, p. 202) raise important questions regarding the validity of voice research, stating that it is a "debunking strategy", in that it attempts to displace the "dominant" knowledge claims, by revealing these claims to be epistemologically false. Furthermore, Arnot and Reay (2007, p. 313) argue that "coherent, explicit, systematically principled and hierarchically organised knowledge is replaced with the oral, context-

dependent and segmentally organised knowledge". It is therefore critical to acknowledge the contested nature of voice research and to fully explore the contestations in such research.

Voice research is said to "privilege the mundane", as "experience replaces theory as the author of knowledge" (Moore & Muller, 1999, p. 202). Consistent with this are the claims made with regard to epistemology and what constitutes knowledge. It is often argued that for anything to be regarded as knowledge, it needs to be valued, it needs to be true, and there needs to be some sort of justification or evidence to support the particular knowledge claim. In line with this characterisation of knowledge, it could then be argued that voice research provides little epistemological value. Moore and Muller (1999) support this claim and state that through voice research we are claiming that individual experiences which are context-dependent are regarded as knowledge. Moore and Muller (1999, p. 202) further argue this claim and state that "voice discourse operates primarily as a debunking strategy", in that there is no scientific proof to support it, and it does not satisfy the above-mentioned criteria of what constitutes knowledge. Seen from the perspective of this argument, experience is very subjective and can never be exactly repeated to provide other individuals with that exact same experience, and therefore, according to this argument, experience cannot count as knowledge or provide much value. According to this argument, if something is not proven (scientifically), how are we able to pass on that "knowledge" to others if we are not able to prove its validity? This argument would thus hold that voice research cannot provide much epistemological value.

The researcher, however, contends that voice research can indeed provide epistemological value, in that it is sometimes through individual experience that we are able to further explore certain knowledge claims and come to know and understand a particular form of knowledge more deeply. Ultimately, it is through one's experience which is conveyed through the voice that knowledge is more easily understood and taught to others. In certain contexts, a combination of both experience and knowledge (epistemology) is required if we are to go beyond minimal understanding and expand on current knowledge.

Added to the considerations discussed above are the complex issues of whose voice gets heard and what it means to write the "other". An issue in voice research is whose voices to select to hear. This issue is particularly relevant when trying to understand experiences

of inclusion and exclusion (Walton, 2011). On the one hand, the act of identifying a particular group to listen to has the effect of signalling that the experience of that group is expected to be different, or unusual, and so the research has the potential to perpetuate the "otherness" of that group (Allan, 2007). On the other hand, we will not know how certain programmes and practices are experienced by certain groups of learners unless we select according to particular identity markers, and we are therefore obliged to do so. It is then inescapable that there will be unequal power relations in any research involving young people, and the responsibility in presuming to relay the voice of the "other" is thus considerable.

2.7.1 INCLUSION AND VOICES

According to Roaf (2002), as cited in Messiou (2006), researching children's voices in relation to inclusive education is a relatively new idea. She argues that such research "has great potential in terms of improving children's experience of education, on the one hand, and developing teachers' understanding of their pupils, on the other hand" (Roaf, 2002, as cited in Messiou, 2006, p. 307).

Research has been conducted in recent years *with* learners (rather than *on* them), with particular focus on learners who face marginalisation or exclusion. An example is a study by Sookrajh, Gopal and Maharaj (2005), who listened to the voices of "refugee" learners in a school which had "included" them. The learners revealed their experiences of name-calling, alienation from the curriculum, and rigid assumptions about their experiences. Through listening to the learners' experiences, teachers became aware of the challenges faced by these learners, and they were able to be more pedagogically responsive in the classroom and make the school culture more inclusive.

Another example of such research into learner experiences is a study by Simpson (2012), who investigated the challenges and opportunities that previously disadvantaged black scholarship and bursary learners experience in independent schools. She aimed to "gain an understanding of the experiences that scholarship learners have within independent school environments and to find out what the opportunities and challenges are that they may face" (Simpson, 2012, p. iii). Although her research focused on issues of identity, I am more interested in how learner experiences can be interpreted in terms of inclusion,

exclusion, and marginalisation. The rationale for conducting such research is that by listening to the voices of learners, it is hoped that a greater understanding will develop of learners' experiences, and that through this the challenges that learners face will be acknowledged, which could, in turn, "make a great difference to each learner's educational experience" (Simpson, 2012, p. 71).

Messiou (2013, p. 12) also found that listening to the voices of participants (learners), and involving learners as co-researchers, "opens up opportunities for engagement of those at the heart of school experience, students". Furthermore, involving learners can be interpreted as a positive attempt to be inclusive. Messiou (2013, p. 12) makes the following argument for including learners in research: "If inclusion is about listening to all, regardless of age or labels assigned to them, as Mittler (2000) argues, then an involvement of students in research becomes necessary in efforts to be more inclusive".

Against the background of the literature reviewed above, it is clear that we perhaps need to listen to the voices of children and young people in order to address and understand educational inclusion, exclusion and marginalisation in greater depth. The following chapter will explain the methodology adopted in executing this research.

CHAPTER 3
RESEARCH METHODOLOGY

3.1 INTRODUCTION

The purpose of this study, as stated in Chapter 1, is to address the knowledge gap and listen to the voices of disadvantaged learners and their experiences in affluent independent high schools after having receiving a scholarship. The study aims to determine to what extent scholarship recipients experience inclusion and possible marginalisation.

In achieving the above, this chapter aims to discuss the qualitative approach followed in conducting this research study, as well as the empirical and phenomenographic research design that was used. In addition, this chapter explains the methods and instruments used to collect the data, as well as the criteria employed for participant selection, and it provides an explanation of the procedures followed, and an analysis of the data. Lastly, ethical considerations and issues of credibility and trustworthiness are discussed.

3.2 RESEARCH APPROACH

Qualitative research is the chosen approach for this study, as it is "not done for the purpose of generalization but rather to produce evidence based on the exploration of specific contexts and particular individuals" (Brantlinger et al., 2005, as cited in Leatherman, 2007, p. 15). According to Leedy and Ormrod (2008), a qualitative approach can help the researcher define what is important. All qualitative approaches involve studying a phenomenon in all its complexity (Leedy & Ormrod, 2008). In relation to the topic being researched, a qualitative rather than a quantitative approach was best suited to this study, since the research topic is not concerned with quantity, but rather focuses on the reasons that certain actions or behaviours have occurred in a particular context. The voices of disadvantaged scholarship learners with regard to their experiences and perceptions were the main focus of this research, in relation to inclusion, exclusion and marginalisation. The study therefore aimed to understand the complex nature of this phenomenon from the point of view of the participants (Leedy & Ormrod, 2008, p. 94). In

support of this approach, Creswell (2007, p. 37) states that “qualitative researchers use an emerging qualitative approach to inquiry, the collection of data in a natural setting sensitive to the people and places under study”. The “natural setting” which Creswell (2007) refers to is the current situation of learners in affluent independent high schools after having received scholarships. Conducting qualitative research therefore “allows the investigator to interpret and bring to light an understanding of particular subjects and events” (Leatherman, 2007, p. 3), which would not necessarily be achieved quantitatively.

3.3 RESEARCH DESIGN

This research is empirical in nature, in that it “accepts our experience of the world as a valid way of deriving new knowledge” (Fraser, 2004, p. 18). Due to the fact that the research project focuses on research *with* children, as opposed to research *about* or *on* children, it allows the learners to become active participants in the research process. As a result, learners’ voices, opinions, and experiences are being heard, resulting in what I hope to be documentation of genuine feelings and experiences for the purposes of creating new knowledge and understanding.

The research design is primarily phenomenographic, as it aims to investigate the qualitatively different ways in which people experience, conceptualise, perceive, and understand various aspects of, and particular phenomena in, the world around them (Marton & Pong, 2005; Marton, 1986). This research aims to understand how learners conceptualise their experiences in affluent independent schools.

Phenomenography is a relatively new approach to education research, with the first descriptions of the approach having been published in 1981 by Ference Marton. Marton (1981, p. 180) argues that research which “aims at description, analysis, and understanding of experiences”, that is, research which is directed towards experiential description, points to a relatively distinct field of inquiry referred to as “phenomenography” (Marton, 1981, p. 180). It is important that phenomenography not be confused with phenomenology. Although both these approaches have the aim of revealing human experience and awareness as an object of research, they are not the same. Barnard, McCosker and Gerber (1999, p. 213) distinguish between these two approaches as follows: “[In phenomenology] the intention is to describe the world as people experience

and explain it, however phenomenography arrives at a different level of description and aims to describe the world as it is understood". Phenomenography is therefore more focused on collective meaning, as opposed to individual experiences, and it "aims to describe variation in understanding from a perspective that views ways of experiencing phenomena as closed but not finite" (Barnard et al., 1999, p. 214).

Despite the similarities between these two approaches, "phenomenographic results focus on the descriptive level of participant understanding, and research is presented in a unique empirical manner" (Barnard et al., 1999, p. 214). In essence, phenomenography examines the experience of each participant and recognises that each participant's experience is an internal relation between the participant and the phenomenon.

What distinguishes this study from a phenomenological study is the experiences of learners in relation to the various ways in which they experience school with regard to inclusion, exclusion, and marginalisation. The phenomenon under investigation is not schooling, as such, as this would imply that the phenomenon is related to the school system, which would require that the views and experiences of the teachers and the principal be included in the research. If I were to include in this research the experiences of the teachers and the principal, I would take the focus away from the experiences of the learners. The phenomenon being researched is thus the experiences of those learners in affluent independent schools who come from a previously disadvantaged background and who are scholarship recipients.

To further understand the methodology of phenomenography, we can distinguish between "developmental phenomenography" and "pure phenomenography". Marton (1986, p. 38) describes "pure phenomenography" as "describing how people conceive of various aspects of their reality". "Developmental phenomenography", on the other hand, "seeks to find out how people experience some aspect of their world, and then to enable them or others to change the way their world operates" (Bowden, 2000, p. 3). This research takes on a developmental phenomenographic approach, as it attempts to understand the social reality of the participants, and it is hoped that the findings will result in "new meaning, fuller meaning or renewed meaning" (Gray, 2009, p. 22). Developmental phenomenography can be seen to promote inclusivity, as it broadens the perceptions of individuals in society regarding inclusive practices and provides possible best practices on how to effectively include learners.

3.4 DATA-COLLECTION METHODS AND INSTRUMENTS

In selecting the data-collection methods and instruments for this research, the aim was to move away from the traditional "monomodal" approach to a "multimodal" approach, where different and creative methods of collecting data are used. The essential factor in moving away from a monomodality is that in order for a researcher to make sense of the participants' experiences, he or she must acknowledge that "a variety of modalities – verbal, visual, sound, touch – make up a person's experiences of the world" (Reavey & Prosser, 2012, p. 185). Relying solely on individual interviews increases the possibility of not obtaining rich data. This may be due to an inability among some learners to effectively express their experiences verbally, where they would be more comfortable expressing themselves through other modalities. Furthermore, it needs to be acknowledged that in working with young adults, it may not always be possible to gather all the information we need at once. Multimodal approaches to data collection "combine visual (photography, drawing and painting) and verbal/written (interview, focus group discussions and diaries) data to create a richer picture of the topic under study" (Reavey & Prosser, 2012, p. 193). It can be argued that multimodal approaches promote inclusivity by allowing learners to express their experiences in ways that best suit their individual needs and preferences, with the hope of obtaining rich, meaningful data. Reavey and Johnson (2008) promote the use of such approaches by arguing that using various data-collection methods elicits information through creative forms and moves away from oral communication to something more dynamic.

The data for this research was collected mainly through semi-structured individual interviews and journal writing. Other tools such as "photo diaries" and a "message in a bottle" question were used to elicit further information.

3.4.1 INDIVIDUAL INTERVIEWS

The individual interview was the main data-collection method used in this study, as this method "yields a great deal of useful information" (Leedy & Ormrod, 2008, p. 146). In the researcher's opinion, the questions were "designed to reveal different ways of understanding the phenomenon within [a particular] context" (Bowden, 2000, p. 8). Individual interviews are closely related to phenomenographic interviews, where the participants are asked to respond to a set of pre-planned questions. The interviews

therefore took on a “semi-structured” form, with open-ended questions allowing the participants to accurately express their views, thoughts, experiences, and any other issues relating to the research topic or questions. Besides the above-mentioned advantage of individual interviews, participants are also encouraged to reveal “their ways of understanding a phenomenon, that is, to disclose their relationship to the phenomenon under consideration and express their qualitative understanding of the phenomenon under investigation” (Bowden, 2000, p. 9). This allowed the participants to think more openly and accurately than would be possible if a questionnaire, for example, had been used.

In formulating the questions for all the interviews, questions needed to be clear and concise, leaving no room for uncertainty or misconceptions. The research questions needed to be clear, so as to prevent participants from answering questions to “please” the researcher, which would result in biased responses. Open-ended questions were asked to ensure that “participants could best voice their experiences unconstrained by any perspectives of the researcher or past research findings” (Creswell, 2008, p. 225). It is essential with phenomenographic interviews that the researcher be careful not to introduce their own ideas concerning the phenomenon being investigated. Although an interview schedule was set up beforehand (see Appendices G and H), probing questions were needed to “elicit elaboration of detail, further explanations, and clarification of responses” (Leedy & Ormrod, 2008, pp. 147, 358). Probing questions further ensured that participants revealed their understanding of the phenomenon more fully and clearly, so as to prevent any misconceptions by the researcher.

As with all data-collection methods and instruments, there are both advantages and disadvantages to conducting interviews, which need to be considered. Although individual interviews may yield useful information and allow participants to describe detailed personal information, it is possible that the interviewee could respond with replies that they feel the researcher wants to hear (Creswell, 2008, p. 226). In an attempt to eliminate or mitigate this disadvantage, indirect questioning and hypothetical questions were used as an attempt to make the interview feel less like an interrogation. This was achieved by asking participants to imagine themselves or their peers in a particular situation or scenario, and how they imagine they or others would behave in, react, or respond to the situation. Furthermore, it was important to be courteous and respectful at all times, show genuine interest and compassion, which maintained general feelings of trust, and to allow the participants to express their thoughts in their own way, and not to put “words in their

mouths" (McMillan & Schumacher, 2009, pp. 147, 149). Due to the nature of the study, there was the potential for emotional responses, which also needs to be considered. In the event of interview questions eliciting strong emotional reactions, participants would be given the opportunity to take some "time out" before the interview was continued with. Alternatively, they were given the choice of suspending the interview and continuing with it another day, if they wished to do so. Due to the possibility of emotional responses, it was of utmost importance to ensure that the researcher did not show any signs of surprise or disapproval at what was being said. This may have led to participants giving false information in an attempt to seek approval and acceptance by the researcher.

Over and above the considerations mentioned above, it was essential that each individual interview take place in a secure environment. This would ensure that the learners felt comfortable and were at ease to express themselves, without their identity being revealed or their being overheard by their peers or teachers. In this regard, Gollop (2000) and Brooker (2001) suggest that being in a familiar environment with trusted adults results in young children responding more positively to being interviewed. Other "voice" studies, such as Messiou (2006, 2008), have had successful results conducting individual interviews, as it eliminates the need for the researcher to go into the classroom to focus on specific children potentially experiencing marginalisation. Furthermore, the use of individual interviews eliminates the danger of "one person dominating the conversation" (Messiou, 2006, p. 308), which may be a potential problem in group interviews or discussions.

Each participant was interviewed on two separate occasions, with each interview eliciting different information. During the first individual interview, participants were asked questions according to the interview schedule (see Appendix G), to obtain information pertaining to their schooling experience. During the interview, learners were also given a disposable camera for the purposes of keeping a photo diary, and they were requested to keep a personal journal. The researcher requested each learner to collect their camera and have their photographs developed before the second individual interview. This second and final interview was used for learners to explain the photographs that they had taken and the journal entries that they had written. At the end of this interview session, and as a concluding question, the learners were asked a "message in a bottle" question (see Appendix H).

3.4.1.1 PHOTO DIARY

In addition to the individual interview, discussed above, and in the hope that it would make learners more able and willing to express their perceptions and experiences, a "photo diary" method was also used. Although Reavey and Prosser (2012, p. 194) claim that photographs are "perhaps the most popular visual medium to be used in psychology", it would seem to be the case with inclusive education research as well. By inviting learners to "speak in their own voice", I am accommodating the varying preferences of learners to express themselves non-verbally. Furthermore, this approach allows the researcher to "gain access to [participants'] thoughts, experiences or modes of accounting" (Reavey & Johnson, 2008, p. 297). It is, however, important to emphasise that the photographs were not used as a source of data, but rather as a tool to stimulate interview discussion, and possibly additional interview questions.

In an attempt to further engage participants in the research process, "visual research" has been more commonly used by qualitative researchers to achieve fuller participation of participants (Reavey & Prosser, 2012). "Photo voice", a term used by Caroline Wang (1999) to refer to the use of cameras in research, has increasingly become a common data-collection tool in education research in South Africa.

In an attempt to completely engage the participants, it was requested that each learner complete a photo diary. Each participant was given a disposable camera and asked to take pictures of objects, people, or places that made them feel happy and safe, or where they felt either included or excluded. This process, according to Reavey and Prosser (2012), is known as "photo-production", as images are generated by the participants in the context of the research. Through photo diaries, the aim was that the photographs would "serve as a representation of children's experiences which might not be easily articulated in other ways" (Clark, 2005, p. 495). The developed photos were not interpreted by the researcher, but rather were used as a "tool" to prompt interview questions pertaining to the photos. This would allow the participants to explain their thoughts, feelings, perceptions, and experiences concerning each photo. For this reason, learners were asked to explain each photo in a second individual interview. Reavey and Prosser (2012) refer to this as "photo-elicitation". This is because the researcher uses existing images (taken during the photo-production stage) to elicit or prompt discussion in an interview and to ask further

questions related to the learner's photos. However, as with all interviews, probing questions had to be asked for more detailed explanation and further clarification.

The advantage of photo elicitation, as pointed out by Mitchell (2004), as cited in Moletsane, De Lange, Mitchell, Stuart, Buthelezi & Taylor (2007, p. 3) is that "encouraging children to take pictures not only involves learning but also involves a large and significant element of having fun". Allen (2011, p. 499) used photo methods in research on sexualities and schooling and found that "photo-methods held appeal for their potential to engage students to think reflectively about their everyday experiences". Other studies, such as that of Moletsane et al. (2007), which aimed to promote childhood and youth activism in the context of HIV and AIDS, that of Clark (2005), who listened to young children in early childhood institutions, that of Gadd and Cable (2000), that of Clark and Moss (2001), and that of Lancaster (2003), are a few of the several research projects that have successfully used cameras and photographs as a means of collecting data.

While researchers should acknowledge the advantages and benefits of photo elicitation, they also need to take precautionary measures when using this method of data collection. A concern expressed by Fielding (2007, p. 304) with regard to the method of using photographs taken by young people to capture aspects of their experiences and aspirations is that such photographs are "subject to too little scrutiny". Another concern expressed is that of Emmison and Smith (2000), who question the methodological adequacy of the method, and Fielding (2007) expresses concerns over how the images are interpreted by researchers. In this regard, it is important to remember that photographs "must always be considered a selective account of reality" (Emmison & Smith, 2000, p. 40), and that it is not up to the researcher to interpret the images.

In essence, as with individual interviews, it is important that we "examine the function, use and limitations of the methods being used", and that as researchers, we take all these considerations into account as we progress with the data-collection process (Mitchell, 2008, p. 376).

3.4.1.2 MESSAGE IN A BOTTLE

After affording each participant a variety of methods for articulating their perceptions and experiences with regard to the research questions, it was hoped that the participants would begin to think about their experiences more critically. By using multimodal methods, certain aspects pertaining to the participants' experiences, both positive and negative, may be brought to light. Based on this assumption, at the end of the second individual interview, a final "message in a bottle" question was asked.

The "message in a bottle technique", as used by Davies (2000), was adapted by Messiou (2006), where the participant was, in an imagined situation, asked to send a message to another planet, country, or any famous person, saying what they would like to see changed in their school to make their schooling experience more positive. Through the use of this technique, participants were afforded the opportunity to express their most unpleasant or negative experiences or perceptions, and things that they would like to see changed in order to make their schooling experience more positive.

Learners' responses to the "message in a bottle technique" were therefore used for data analysis, together with the responses to the individual interviews, the photo diary, and the journal entries.

3.4.2 JOURNAL

Another method that learners were provided with to communicate their perceptions and experiences, other than orally or through the use of a photo diary, was through journal writing. This method of collecting data was used to cater for learners that perhaps may not have wanted to express their experiences orally, or that may have felt uncomfortable doing so, and this method thus afforded these learners the opportunity to write down their experiences instead. An advantage of using journal entries in research is that collecting documents, either private or public, provides a valuable source of information in "helping researchers understand central phenomena in qualitative studies" (Creswell, 2008, p. 231).

For the purposes of this study, participants were asked to keep a personal journal, where they would write journal entries about any positive or negative experiences they have had

with regard to their school experience. A set of questions/statements (see Appendix G) were given to each participant as a guide for writing each journal entry, or they could respond to any of the given questions/statements to write a journal entry. The advantage of using journal entries for data collection is that they are "written in the language and words of the participants, who have usually given thoughtful attention to each journal entry" (Creswell, 2008, p. 231).

Although journals provide a valuable source of information, a practical concern raised by Reis and Gable (2000) is that research where personal journals are used to collect data often require detailed training sessions to ensure that participants fully understand what is expected. In order to obtain reliable and valid data, a level of participant commitment and dedication is needed, which is not usually required in other types of research studies (Bolger, Davis & Rafaeli, 2003). Based on this, I needed to take into account the time demands that journal writing places on the participants, and I needed to "design [journal writing] instruments that are short and take several minutes to complete" (Bolger, Davis & Rafaeli, 2003, p. 592).

3.5 PARTICIPANTS

3.5.1 SELECTING SCHOOLS

Affluent independent schools were selected based on whether the school or a Student Sponsorship Programme (SSP) was providing disadvantaged learners with scholarships to attend the school. "Affluent", for the purposes of this study, refers to schools that charge school fees in excess of R46,700, the highest fee bracket designated by the Independent Schools Association of Southern Africa (Hofmeyr et al., 2013). Having received ethical clearance from the university's ethics committee, I was able to approach various independent schools in the Johannesburg area and request permission to conduct research at their school. After approaching a number of independent high schools that met the selection criteria, being that of having previously disadvantaged learners on scholarships in their school, I was able to obtain a manageable number of participants. Despite the fact that there were other affluent independent high schools in the area that had scholarship recipients, the fact that I had already obtained a manageable number of participants is the reason that the sample used for my study consisted of only four schools.

3.5.2 SELECTING PARTICIPANTS

After I had succeeded in gaining access to the school, the school principal referred me to the school psychologist or the SSP and the scholarship coordinator, to assist me in purposefully selecting learners according to my specific criteria. The criteria were simply that the learner had to come from a disadvantaged background, and he or she had to be receiving a scholarship to attend the school. In selecting participants for the study, no discrimination was made on the basis of age, gender, race, or religion. A non-probability sampling approach was adopted. According to McMillan and Schumacher (2009, p. 136), non-probability sampling is "the most common type [of sampling strategy used] in educational research and does not include any type of random selection from a population". For this reason, purposeful and convenience sampling was used, as it allowed the researcher to select participants who would "provide the best information to address the purpose of the research" (McMillan & Schumacher, 2009, p. 138).

"Convenience sampling" (McMillan & Schumacher, 2009, p. 137) enabled me to select participants based on accessibility and convenience. Once access was gained into the schools, the willingness to participate and the availability of the learners influenced participant selection. It is important to acknowledge the fact that convenience sampling could have introduced biases that the researcher may not be aware of, and which need to be addressed. With "convenience sampling", the findings may be extremely useful; however, caution must be exercised not to generalise the findings to just any population.

The table that follows provides a brief summary of the selected schools and the number of participants from each school who participated in the study.

Table 1: A brief summary of the selected schools and the participants

SCHOOL	TYPE OF SCHOOL	PARTICIPANTS
School A	Co-ed high school	1 Grade 8 girl 1 Grade 9 boy 2 Grade 10 girls
School B	Co-ed high school	1 Grade 12 girl 1 Grade 12 boy
School C	All-boys school	1 Grade 8 boy 4 Grade 9 boys 1 Grade 10 boy
School D	All-boys school	2 Grade 8 boys 2 Grade 10 boys

3.6 ETHICAL PROCEDURES

Before participants were approached, the school principal and the chairperson of the school governing body received an information sheet (see Appendix A) and were required to sign an "Acknowledgement of receipt of information sheet" (see Appendix D), thereby granting permission for the research to continue. Due to learners being under the age of 18 years, consent was first obtained from the learner's parent/guardian/caregiver. Each parent/guardian/caregiver received an information sheet (see Appendix B), stating that their child was invited to participate in the study. Once parent/guardian/caregiver consent was obtained, each learner received their own information sheet (see Appendix C), inviting the learner to participate in the study. The information sheet for learners was written in simpler language, to ensure that the learners completely understood what they were consenting to.

According to Leedy and Ormrod (2008, p. 101), ethical issues can be categorised as "protection from harm", "informed consent", and "right to privacy". It is important that the researcher disclose to the participants that the activity is for research purposes, and that participation is completely voluntary.

In terms of "protection from harm" and "right to privacy" with respect to participants, it was stressed to each participant that: (i) their participation was completely voluntary, and they

would not be advantaged, disadvantaged, or compensated in any way for participating; (ii) their identity and personal details would be kept strictly confidential, and pseudonyms would be used to ensure anonymity (Leedy & Ormrod, 2008); (iii) participants could withdraw from the study at any time should they wish to do so, without incurring any negative consequences; (iv) participants' details would not be mentioned at any point in the study; and (v) it was envisaged that the research findings would be used for academic purposes, including the writing of books, journal articles, and conference papers. In addition, the name and contact details of the researcher and her supervisor were provided, in case participants should have any questions or concerns during the course of the study. In observing participants' right to privacy, learners were interviewed in a quiet and secure environment, to ensure that nobody else could hear what was said in each interview.

As far as "informed consent" is concerned, this was obtained by providing each participant with information sheets that disclosed all information regarding the nature of the study, what participation would involve, and the duration of the study.

The consent forms which needed to be signed by the parent/guardian/caregiver (see Appendix E), as well as the learner (see Appendix F), as proof of their voluntary participation included the following: (a) consent to participate in individual interviews; (b) consent for all individual interviews to be audio-recorded and transcribed; and (c) consent for documentation to be used, which included the learner's photo diary and journal.

3.7 DATA ANALYSIS

Once all the participant interviews had taken place, the first step was to transcribe the audio-recoded interviews verbatim. Terre Blanche and Kelly (2004) recommend that once the process of transcribing is complete, transcripts should be checked for reliability, by listening to the audio recordings a second time while reading the transcribed material. This process was carried out by me (the researcher), to ensure that I was familiar with the data, and to ensure insightful and in-depth data analysis. In analysing the data, it is important to acknowledge that true objectivity can never be achieved, but that the researcher's interpretations should be as objective as possible (Hays, 2010).

Due to the fact that this research adopted a phenomenographic approach, the process of data analysis followed differed somewhat from that of traditional thematic/content analysis. Thematic analysis, according to Howitt and Cramer (2007), is not dependent on a specialised theory, but rather on the identification of a limited number of themes through coding, which adequately reflects the textual data. Thematic analysis is in line with the idea of "constructing categories", which implies that the researcher has control over the data, and that categories "emerge from the relationship between the data and the researcher" (Walsh, 2008, p. 20). The researcher's perspectives thus influence the construction of categories, and tend to fit some predetermined framework. This is a common method of analysing data qualitatively and portrays individual responses to specific themes or categories.

In contrast to thematic analysis, phenomenography focuses on the collective meaning of participant responses. Data in this study was analysed phenomenographically. Phenomenographic analysis is similar to grounded theory analysis, which is based on the assumption that categories evolve purely from the data and are not dependent on the researcher's method of analysis (Glaser & Strauss, 2012; Walsh 2008; Marton & Säljö, 1984). This implies that the researcher begins analysing the data with no preconceived themes or categories, and themes are allowed to evolve from the data.

According to Marton,

> phenomenographic analysis entails the continual sorting of data [...] definitions for categories are tested against the data, adjusted, retested, and adjusted again. There is however a decreasing rate of change and eventually the whole system of meanings is stabilised (1986, p. 42).

Phenomenographic analysis is therefore the development of categories of description representing the different ways of understanding the phenomenon being researched, thus "giving" a map of the "collective mind" (Marton, 1995). According to Maybee (2007, p. 454), these categories of description are arranged "in an outcome space reflecting how each category is structurally related". Essentially, the categories in the outcome space provide a detailed picture of how the particular phenomenon under investigation is experienced.

In terms of this research and understanding the lived experiences of scholarship recipients, the categories of description that emerged from the data were closely linked to

the way inclusive education was defined in section 2.3. The three main issues of inclusive education, namely access, participation, and belonging, provide a solid account of the experiences and perceptions of scholarship recipients. This is elaborated on in Chapter 4.

3.8 VALIDITY AND RELIABILITY

Although a common method to ensure credibility of research findings is "triangulation" (Creswell, 2007, p. 208), it is stressed that triangulation was not the aim of the multimodal approach to data collection used in this research. Rather, a multimodal approach was used to provide depth and richness to the learners' responses.

Validity of research refers to how well the researcher's findings correspond to the phenomenon that is experienced by the participants. The focus is therefore in ensuring that the research aims are "appropriately reflected in the research methods used" (Akerlind, 2005, p. 330). Validity of this research and a defensible interpretation of the data were ensured through working with a supervisor. Lincoln and Guba (1985), as cited in Creswell (2007, p. 208) refer to peer reviewers as "Devil's advocates", since they ensure that the researcher remains honest, and that the methods used and the meanings and interpretations formulated are credible and trustworthy. It is, however, not appropriate in phenomenographic research to seek validity through "member checking", which involves taking the rough findings back to the participants for their perusal and validation (Creswell, 2007). This is because the aim of phenomenography is to gather and understand the collective meaning of the data, and to capture the range of experiences of the participants, rather than individual responses (Akerlind, 2005).

Reliability was achieved through "dialogic reliability checks", which Akerlind (2005, p. 331) refers to as "the agreement between researchers through discussion and mutual critique of the data". Discussion and mutual critiques were obtained from both my supervisor and my colleagues, as well as from members of a research symposium, where I presented my preliminary findings (Combrink, Dolowitz, Geyer, Kimani & Phillips, 2013).

3.9 CONCLUSION

This research is designed to achieve the aim of addressing the knowledge gap with regard to the voices and experiences of disadvantaged learners on scholarships in affluent independent high schools. This chapter explained various aspects with regard to the qualitative approach and phenomenographic research design used in this study. In addition, the data-collection methods, the participant selection strategy, and the data-analysis procedures were elaborated on, together with considerations of validity and reliability.

The following chapter records and discusses the data gathered and the findings generated through the multimodal approach used in this study.

CHAPTER 4
FINDINGS AND DISCUSSION

4.1 INTRODUCTION

After analysing the data phenomenographically, this chapter first elaborates on the three main issues of inclusive education based on the collective meaning of participants' responses, namely access, participation, and belonging. Thereafter, learners' responses to the message in the bottle technique are discussed with regard to possible positive changes.

4.2 ACCESS

4.2.1 FORMAL ACCESS

"Formal access", which relates to and depends on factors such as admission rules and finances, and "epistemological access", which refers to access to knowledge (Morrow, 2007, p. 2), are both issues that emerged from the data. Formal access as it relates to this study, refers to the selection and admission of scholarship learners into the affluent independent schools. Learners' perceptions of why they had been granted formal access into the schools can be grouped into three main categories. The first category pertains to academic performance in their previous school. In terms of this category, it was found that some learners attributed their selection to their ability to excel academically. These learners responded that it was their academic talent that had been identified in their previous school that was the reason they had been granted a scholarship and, in turn, access into the independent schooling system. The second category of learners' perceptions of the reasons they had been granted formal access was their diligence. Hard work and dedication were thus important factors in being selected to attend an affluent independent school. This is confirmed by the response made by one learner, who stated that "*the school noticed all the hard work I have put into everything I have done*".

As a result, many learners felt that they had not been given an opportunity, but had rather earned it through hard work. The third category related to potential and future promise. In this regard, learners attributed their perceptions of why they had been granted access to

either "*principals thinking they had potential*" or "*SSP believing in their ability to adapt to the environment and in turn perform well*", thus suggesting that they were selected because they showed future promise. Although it is not related to academic potential, some learners felt that they had become scholarship recipients because of their potential to excel in sport. There was one response where the learner did not attribute his scholarship to his current or potential achievements. Rather, he believed that he had been awarded a scholarship "*to get a better education and a better future in life*".

What is worth noting is the fact that these learners focused on themselves and their record of achievement in explaining their selection as scholarship recipients. No evidence in the data was found to suggest that learners had been unfairly advantaged in the selection process. This means that learner selection was based primarily on the learners' ability to achieve. It is important to reiterate that talent is not easy to identify, and it is often seen as compliance by teachers (Reeves et al., under review; Richards, under review). However, the learners were confident in their identification as scholarship recipients. Their confidence seemed to stem from their perception of themselves as deserving winners of a legitimate contest. This perception served as an asset (Fergus & Zimmerman, 2005) or a source of help, which made the learners resilient (Hall-Lande, Eisenberg, Christenson & Neumark-Sztainer, 2007) and able to face the challenging academic demands of their new school. This is consistent with the findings of Kuriloff and Reichert (2003, p. 755), who studied how boys from diverse backgrounds manage in an elite school and found that the boys constantly "reinforced their sense of luck, opportunity and privilege".

4.2.2 EPISTEMOLOGICAL ACCESS

Once formal access has been gained through the awarding of a scholarship, the focus changes to epistemological access. Despite the fact that the scholarship learners had academic potential, were hard workers, or showed promise, there seemed to be significant differences in their perceptions of the standard and difficulty of the work when they started attending the independent school. The scholarship learners found the work to be challenging at first, as the standard was much higher than at their previous school. In terms of the learners' adjustment and ability to excel, two major contributing factors were evident from the data, namely "individual effort" and "teacher support". With regard to individual effort, the learners articulated that there was a need for them to "adjust" to the

higher academic expectations of the independent school. The general perception among the learners was that they had to make double the effort to achieve results that they were happy with. Some learners took up to two years to adjust to their new school. Nevertheless, all the learners articulated that they had experienced some degree of success in adjusting, and that they were able to excel.

The epistemological access and academic performance of the learners was boosted by their receiving "teacher support", tutor instruction, or peer support either during or after school hours. There was consensus among the participants that they, and also their peers, were given more than enough help and extra support to cope with their academic work. It was found that the teacher support at all four schools was extensive, where all learners in the school were catered for. The scholarship recipients, in particular, benefited from this. Extra lessons or tutor lessons were offered to learners for all their subjects. One learner stated that teachers "*were always there, as long as you make a time for them*". In addition, learners communicated that teachers were understanding of the learners' circumstances and their need for time to adjust to their surroundings. This was particularly evident at times when learners struggled to meet deadlines because of limited access to computers, the Internet, or finances. This finding is consistent with te Riele's (2006) claim regarding the importance of positive interpersonal relationships between teachers and learners in the effective provision of support. It is important to emphasise that these scholarship recipients, who were top achievers in their previous schools, may not have identified themselves as learners that had a need for academic support. However, on admission to an independent school, they are now cast as needing support to maintain their level of academic performance. This was particularly evident from the response of one learner, who explained how he was an "*A-student in his previous school, but upon acceptance was required to repeat Grade 9*". It would thus seem that formal access and epistemological access in the independent school are not necessarily achieved concurrently.

The act of benevolence, or moral obligation to help those who are economically challenged, in the form of a scholarship, enables access to schools that would otherwise be inaccessible for certain learners. However, if we move beyond access and reflect on the other two issues of inclusive education, namely participation and belonging, it is clear that the act of benevolence casts shadows on other spheres of the educational experience for the scholarship recipients. The metaphor of shadows is appropriate, as shadows "can

be thought of as occupying a liminal space, one between absence and presence and are partly understood in relation to absence" (Johnston, 2013, p. 7). Shadows, cast mainly by acts of benevolence, can be seen as a metaphor for the various features of schooling that exist and are available for most learners, but are absent or are unavailable for many scholarship learners.

4.3 PARTICIPATION

4.3.1 ACADEMIC PERFORMANCE

When investigating academic performance in the shadow, it was discovered from the data that the scholarship recipients were faced with academic challenges in respect of technology and finances. With regard to technology, it has become increasingly common for primary and high school learners to use mobile phones to aid them in their learning, either in the classroom or at home (Nagel, 2013; Rice, 2012). Since the scholarship recipients come from underprivileged backgrounds, most of them cannot afford to purchase such devices. In such cases, the scholarship recipients are not always able to participate fully in the lessons. This finding was confirmed by a response by one learner, who said that they "*couldn't have access to the information that the other children had access to*". The lack of access to information of the scholarship recipients was evident when one learner took a photo of a smartphone and explained how smartphones were used in class to scan a Quick Response Code (QR) on worksheets and to look up information. He further explained how he was at a disadvantage in not having a smartphone, and that teachers "*hadn't really addressed the issue, and did not really do much about it*". As a result, the learners on scholarships had to access information by other means, by either working together with their peers, or by sourcing the information after school hours from the school library or their home. As a result of this, full participation in the classroom by the scholarship recipients has not been achieved, as learning alongside others and working together with them in *shared* learning experiences (Booth & Ainscow, 2002) has not been fully achieved.

Besides the challenges mentioned above, the financial demands of completing projects and accessing resources constituted another challenge. Learners that did not have a computer at home were not always able to access a computer to complete tasks. Although the schools had a library with computers, learners voiced they did not always

have sufficient time to complete projects, as the library closed early. Other learners, who did have a computer at home, did not always have the required software to complete a particular task. This meant that learners had to complete the task in the library at school, which created challenges and time pressures. When they had to complete a group activity, some of the learners on scholarships felt that "*it was a struggle to get the resources*", which led to the group not having sufficient time to complete the project.

4.3.2 SPORT AND EXTRAMURAL ACTIVITIES

Another aspect which was found to fall in the shadows of benevolence was sport and extramural activities. This aspect can be categorised into two main challenges, the first being attendance, and the second being equipment. With regard to attendance, it was found that although the learners on scholarships received assistance in respect of accommodation arrangements and transport, there were limits to this benevolence. When it was expected of the learners to be at school outside of regular school hours, the schools would sometimes help by providing accommodation or bus fare for the learners. However, transport was still a challenge for many learners. The main challenge experienced by most of the participants was that they had to support school sports events on a Saturday, which was expected of all learners at the school. Due to the fact that most of the learners on scholarships had to travel long distances on public transport to get to school, it was not easy for them to attend these events, as they could not afford the travel expenses. Some learners voiced that they hated it when people judged them when they did not attend school fixtures to support the school. The same sentiments were expressed by another learner, who said that he didn't have money for taxi fare to travel to school to support his school's sports fixtures, and that it was "*one thing [he] really [wants] to change to make [his] experience a lot better*". Even when learners could arrange transport to convey them to school sports events, they would be dropped off early in the morning, and they would have to wait hours before the event started.

Another challenge relates to sports equipment. Schools provided most learners with the required basic school uniform and sports clothes. Sports equipment, however, was generally the responsibility of the learner, and in most cases was too expensive to buy. One learner mentioned that the expensive nature of sports equipment affected the type of sport he could do. He thus chose a sport that made the least demands financially, or

where he could use the same equipment for different sports. To illustrate, one learner stated,

> *I use my boots for soccer and for rugby [...] if I were to do cricket, I would need special shoes [...] for hockey I would need the stick, and stuff like that, so I will try to choose whichever's more convenient for me, because of the equipment.*

All the learners on scholarships in all the independent schools sampled were required to participate in a sport or cultural activity in each term of the year. From the responses received from the scholarship recipients, it was found that many of the learners participated in sports that did not need too much equipment, such as athletics, soccer, rugby, or swimming. Cultural activities, such as singing in the school choir, were chosen instead of a sport by a few learners. Yet another challenge related to sport was sports tours. One learner, who was a keen and talented soccer player, told of how opportunities would arise from time to time, and how he would find himself "*not being able to participate in them, because his parents could not afford to pay for them*".

The challenges discussed above highlight the fact that privilege is often invisible to those who are privileged. Kimmel (2010, p. 5) states that "privilege remains invisible, making it difficult to generate politics of inclusion from invisibility". The scholarship recipients in the study are thus noticing and foregrounding areas of privilege that have not been noticed by those who enjoy the privileges.

4.3.3 SCHOOL TOURS/CAMPS

Besides academic performance and sport, the phenomenon of school tours highlighted some concerns with regard to participation. All the learners had attended some form of school tour or camp during their time at the school. Fortunately for most students, the financial costs were incurred by either the school or the SSP, which meant that the learners could attend. However, a participant wrote in his journal that on one occasion he was not able to attend a camp, as he was unable to pay the costs. Despite the fact that most of the scholarship recipients were able to attend school camps and tours, there are aspects surrounding this issue which are still being shadowed by benevolence. The main shadowed aspect relating to school tours and camps was the fact that learners did not have enough spending money. Although in some cases the SSP or the school assisted in

this regard, it was not so on every occasion. In one instance, a teacher assisted a learner with pocket money, as the prices of the food on sale at the school tuck shop were quite expensive.

Based on the above, it is evident that partial inclusion of scholarship recipients through formal and epistemological access, and in some cases through participation, has been achieved. What remains is to understand the extent that these learners feel a sense of belonging in both the school and the wider community.

4.4 BELONGING

4.4.1 PEER RELATIONSHIPS

Besides access and participation, peer relationships also, to some extent, fall under the shadow of benevolence. Some learners felt that their peers had negative stereotypes regarding scholarship recipients, and that this formed barriers between them and their peers. One learner mentioned that children who had encountered scholarship recipients in their school thought that they were attending an independent school "*just because of the government of South Africa [...] they are not smart. They are just here because the government sponsored them to be here*". She called this the "*single story*" that many learners have regarding scholarship recipients. This "single story" was also mentioned by the other participants. The effect of this "single story" was that on admission to the independent school, scholarship recipients were at first shy, withdrawn, or secretive about their personal background and financial standing. An example of this secrecy about their background was described by a learner, who asserted that he was reluctant to spend weekends at the homes of his friends, in case they expected him to respond with an invitation to spend a weekend at his home. Besides the matters mentioned above, it was evident from the photo diary of many of the learners that the fact that they did not have cell phones, tablets, or laptops made them feel excluded, or "*left out*". This negatively affected the self-esteem of many of the learners, causing them to be very selective about "*the type of people they would socialise with*".

In a study by Horvat and Antonio (1999) it was evident that the experiences of black girls in an elite school were marked by the job of "fitting in". This meant that in order to "survive and indeed prosper in the often unaffirming, if not hostile, white, upper-class organisation",

these black girls had to find ways to “smooth their way into that world” (Horvat & Antonio, 1999, p. 339). This would lead to the learners living two different social lives in order to experience some form of acceptance. In contrast, it was evident in the study that over time, these negative peer experiences seemed to slowly fade away as learners started developing trusting friendships. Having such friendships made the learners feel less uncomfortable about their peers knowing that they were scholarship recipients and knowing about their background. The scholarship learners soon realised and felt that they were not actually any different to their peers, and they were also not treated any differently. Similar findings were evident in the current study, where learners responded that “*we are all getting the same education*” and “*the way everyone is treated is the same, just because they are rich or whatever, everyone is just treated the same*”. Another learner responded by saying “*I wouldn’t say I’m the same as others. We’re all different. We all come from different backgrounds. We are all independent in our own way, so we are all different*”. For one learner, however, this confidence was manifested through his being able to “educate” his affluent peers about the “ghetto” (Soweto) and about “*how they think of the ghetto*”. Since “educating” his peers, he reported that his peers had more respect for him and perceived him as being more confident and outspoken than before. In spite of these feelings of “confidence”, the learners were still loath to disclose to learners outside of their close group of friends that they were a scholarship recipient. Learners feared that they would be treated differently by some peers, or they felt that it was not information that was worth sharing.

In determining what peer relationships scholarship recipients have outside of school, it is important to remember that the majority of these learners travel a considerable distance to get to school. The residential area in which they live is generally far and very different from their school surroundings. In two of the four schools, learners were able to stay in boarding houses or residential houses close to the school. This meant that they would only go home to their parents/guardian/caregivers over weekends or school holidays. Due to the fact that learners boarded at the school and did not go home frequently, the limited contact with their home environment impacted on their peer relationships at home and with peers from their previous school. It was found that because learners did not go home frequently, they drifted apart from their friends, particularly friends from their previous school, due to limited contact and not being able to see them very often. For instance, one learner mentioned how he was hardly at home since coming to the school, and had “*only seen [his friends] four or five times in the past two years*”. As a result, many peer

relationships tended to weaken, and the learners only really had the small group of friends in their current school. The other learners, who did not stay close to their school, still had friends from their neighbourhood or their previous school. Although in some cases there was no regular contact, learners were supported by their friends, and not treated any differently on account of their attending what was referred to as a "rich school".

4.4.2 FINANCIAL STANDING

As discussed in the previous section, it was evident that learners' financial standing was a significant factor in their formal and epistemological access into schools. Not only did it affect epistemological access in terms of technology and resources, but it also influenced the learners' sense of belonging in two ways. The first way related to learners' experiences or perceptions with regard to school holidays. Due to the affluent status of both the school and the majority of its learners, it was found that other learners would enjoy extravagant overseas holidays. On their return to school, it was often the focus of discussion, either among groups of friends or, in some instances, in class discussions. Due to the scholarship recipients not having the financial means to go on such extravagant holidays, it left many of the learners feeling "*sad*", "*not so good*", "*inferior*", or "*excluded*", and they would "*withdraw from the conversation*" and "*try not let it get to [them]*". Although these general feelings were experienced, particularly in their first year or two at the school, the learners explained how over time they had learned to deal with these situations, and that they did not seem to bother them that much anymore. One particular learner stated that such instances did not bother him at all, as he knew that "*[his] mom [was] doing her best to provide for [him]*". Another learner stated that the fact that his peers enjoyed extravagant holidays and he didn't did not bother him, and that it was "*not the places you go to that are important, rather who you spend your time with*". Based on the learners' responses, it was clear that the learners were grateful for what they had and had come to realise that school and spending time with their family was more important than a luxurious holiday.

The second aspect related to the sense of belonging of scholarship recipients was their school experience and whether it would be different if their parents were in a financial position to pay for their school fees. The scholarship recipients responded in one of three ways. One response was that their schooling experience would be the same. Others

responded by saying that it was difficult to imagine, and that they could not easily say whether it would be any different. The third and most common response from the learners was that their schooling experience would definitely be different if their family was wealthy and able to pay for their school fees. In one instance, during a group discussion, learners were complaining about not having a class for a particular subject. During this discussion, a scholarship recipient was told by another learner that "*because you don't pay, you don't get to complain*". Responses such as these highlight the fact that the silence of the voices of scholarship recipients is not only self-imposed, in that they sometimes withdraw from conversations, but that it is also imposed on them by others. This strongly relates to voice research, as it foregrounds the notion that privileged and dominant voices are usually heard, which leads to the phenomenon that not all voices are seen as equal.

Scholarship recipients also felt that a lot of pressure was put on them to perform academically, by both their families and the school, so that they could keep their scholarship. This relates to the "clauses of conditionality" (Slee, 1996) governing the granting of this opportunity to learners, but the pressure that accompanies this opportunity is not foregrounded by the scholarship programmes. Some learners further explained that had their families paid for their school fees, the learners would have felt less pressure to perform academically, and would have enjoyed focusing a bit more on sport. One learner, who was a keen cricket player, explained how he wouldn't mind "*dropping from A's to B's*", while another learner felt that had his family been wealthy, he "*wouldn't have the pressure of having to perform well and having to get a bursary to go to university*".

In addition, it was mentioned by the scholarship recipients that had their families paid for their school fees, they would feel more confident and not so inferior, resulting in them being able to socialise more, participate in group discussions, be more outgoing, and be able to go out with school friends over weekends. One learner thus felt that he would "*have different friends and be more outgoing and more out there, because I know I have stuff*", while another learner felt that not having wealthy parents was something they had to deal with but the fact that they were "*going to bed with a better education [was] great, and have learned to accept it"*. The learners felt that they may have a different attitude from their affluent peers. This was summed up by one learner, who said,

> *[M]y attitude might be different, because if I am being brought up right, you know, rich people don't tend to appreciate everything. You know I don't want to be rude, but*

being a middle-income household, we don't get everything we want, and also my parents have taught me the value of money.

Despite the experiences cited above, there were many responses where the scholarship recipients were unable to imagine what their schooling experience would be like had their families been wealthy.

4.5 POSSIBLE POSITIVE CHANGES

In concluding the data-collection process with the message in a bottle question, learners were asked whether there was anything they would like to see or have changed to make their experience more positive. Although many learners responded saying that there was nothing they would like to see changed, as they were happy in their placement and felt included, there were some exceptions. These included the following responses: "*scholarship learners being more equipped with resources in order to excel*"; civvies day being taken away to "*eliminate the divide between learners*"; and the major factor, namely peer perception. Peer perception seemed to play a major role in learners' sense of belonging, not only with the scholarship learners, but with all the learners in the school. In relation to this, learners commented on how they would like to "*be around friendlier people*", "*end racism*", or simply "*change the perceptions of learners and how humans treat each other*". Beyond these possible changes, the learners did not deem that there were any aspects of their schooling that needed to be changed significantly.

4.6 CONCLUSION

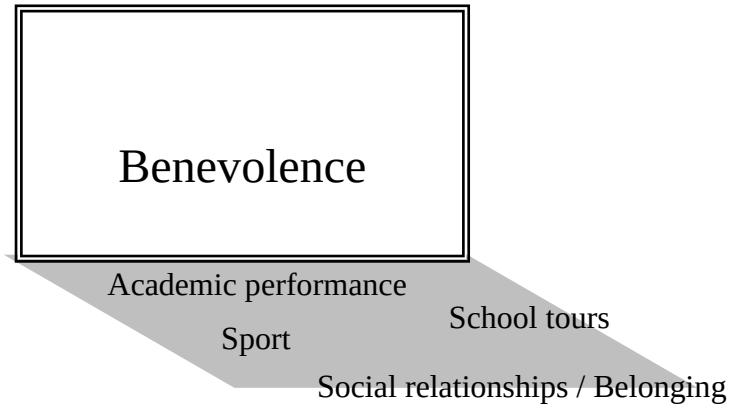

Figure 1: Shadows cast by acts of benevolence

In terms of the shadows metaphor depicting aspects of schooling that fall under the shadow of benevolence, the figure above shows the various categories within the outcome space, thus reflecting how each category is structurally related. Figure 1 thus illustrates the four broad categories that fall in the shadows of benevolence. Participation, often predicted by financial means, affects scholarship recipients both academically and with regard to sport. Other learners may enjoy full participation in these areas, but scholarship recipients experience limits to their participation. Thus, academic performance and sport are shadowed. Participation with regard to school tours and camps was shown to be partially shadowed in that learners are able to experience participation, yet finances limit their full participation. Social relationships and belonging are shown as moving out of the shadow of benevolence, as scholarship learners partially feel that they belong.

In bringing together all the findings and determining to what extent learners experience inclusion or possible exclusion and marginalisation, it is evident that learners do experience inclusion and marginalisation to some degree. In terms of learners experiencing inclusion, the data spoke to inclusion in relation to access, participation, and belonging. Learners definitely experienced some form of inclusion in terms of their having received a scholarship to be "included" into the affluent schooling environment. These experiences of inclusion were made possible by the support that scholarship recipients received from their families, their peers, and their school teachers. A photo that had been taken of a huge chess board was included in the photo diary of one particular learner, and she explained how she saw her life as a game:

> *I see life as a game. You're the player. Then you have coaches in life, and then your fans and critics. A player [a scholarship recipient] plays life at 100% [...] you live once and just make the most out of it. The coaches would be your teachers, your parents, and the people who are guiding you through life. Your critics and your fans [...] they give you constructive criticism, and you can decide what you need.*

The scholarship learners were thus able to experience inclusion in terms of access, participation, and belonging due to the support and encouragement that they continually received.

In contrast to inclusion, the data did not reveal any forms of exclusion where learners were entirely left out, discriminated against, or treated with prejudice, and were, as a result, not able to participate. What is important to note is that learners did to some degree

experience some form of marginalisation. Due to the fact that the learners did not necessarily associate their experiences with marginalisation, it relates to Messiou's (2006, p. 305) third conceptualisation of marginalisation, where "learners are found in what appears to be marginalised situations but do not view these experiences as marginalisation".

It can thus be said that scholarship recipients were, by their own account, mostly uncritical of the scholarship programme, and negative responses that they made related mainly to their experience of the limits of benevolence and the challenges in terms of forming friendships and a sense of belonging. Learners did not attribute their negative experiences to marginalisation, but were more explicit in attributing their "single story" as being the deserving recipients of a great boon, and that difficulties that they experienced were not sufficient to make them critical of the scholarship opportunity.

In conclusion, the data revealed that although learners faced various challenges, they were all appreciative and had to learn to cope with aspects of their schooling experience that were different from their previous school experiences. One learner in her photo diary had given an interesting analogy, which summed this up. She had taken a photo of a drum set, and she explained the photo as follows:

> *The drum set has two meanings. The drum appears to be alone, and I felt lonely at a point. Another thing is that I feel that I have to coordinate so many things at the same time. I have to make sure that I am hitting this one and I'm hitting that drum at this specific time. I just feel so overwhelmed. I have so many things to do and concentrate on. But, like a drummer, I will eventually learn to coordinate everything, and everything will balance.*

It is not to say that scholarship recipients do not face further challenges in future, and the limits of benevolence still need to be addressed, but what is positive is that the learners would seem to have learned to "coordinate" the various aspects of their schooling experience, resulting in a more positive experience for them.

CHAPTER 5
REFLECTIONS, SUMMARY, AND CONCLUSION

5.1 INTRODUCTION

This study was initiated in response to my suspicion that the voices and experiences of economically challenged learners on scholarships in affluent independent schools in the Johannesburg region are not being heard. In listening to the voices of such learners, the research was conducted using the methodology of phenomenography and a multimodal approach to data collection. This was discussed in Chapter 3. The data, which was collected by means of individual interviews, a photo diary, a journal, and a message in a bottle question, revealed noteworthy findings. These were discussed in Chapter 4.

This chapter aims to summarise the core findings of this research, as well as reflect on the research process, while discussing the strengths and limitations in the research design and the execution of the study. Lastly, recommendations are offered for the field of inclusive education, as well as for future research to understand learners' experiences better.

5.2 ANSWERS TO THE RESEARCH QUESTIONS

5.2.1 What are learners' perceptions regarding having been given a scholarship?

Learners' perceptions as to why they had been granted formal access into the independent schools fell into three main categories. The first category related to learners' acknowledgement of their ability to excel academically, thus resulting in their selection. Learners felt that they were thus selected based on their academic achievement. In the second category, learners felt that they were selected based on their diligence and hard work at their previous school and that this had been noticed by their current school. In the third category, learners attributed their formal access to their having potential and future promise. In this regard, learners felt that the scholarship programme and the school recognised their resilience and their ability to adapt, which would result in the learner being able to excel. Despite the responses being generally similar, one learner attributed his

scholarship to his achievements in sport, while another learner felt that he had received the scholarship purely to "*get a better education and better future in life*".

5.2.2 How do these learners perceive their school experience as being similar to or different from the experience of their affluent peers?

In terms of learners' experiences socially, the learners expressed how they felt that their peers had negative stereotypes regarding scholarship recipients, and they felt that they were attending independent schools purely because the government of South Africa sponsored them to be there. This was referred to as the "single story" by many learners. The scholarship recipients were therefore reluctant to share information about themselves, which made the learners want to shy away and keep to themselves. However, over time the learners became more comfortable with their peers and found that they were actually no different from their peers, and they were also not treated differently. Although the learners kept a close group of friends with whom they would share personal information, some scholarship recipients began to feel that they were able to "educate" their peers about the "ghetto", or the areas in which they lived. This provided some learners with more confidence, but other learners still preferred not to divulge their personal information out of fear of being humiliated. This fear of being humiliated was generally related to learners' financial position, and the fact that their family was not paying their school fees. The fear of humiliation was found to be most evident when the affluent learners discussed extravagant overseas holidays that they had been on, or when they discussed new cell phones or tablets that they had acquired. This humiliation resulted in scholarship recipients not being able to contribute to the conversation, and they would instead withdraw from the conversation.

Not only did discussions about cell phones and tablets cause scholarship recipients to withdraw from conversations, but the fact that these learners did not have this technology also created academic challenges for them. Academic challenges were evident among all 16 learners, and related to technology and finances. For example, many affluent learners would use tablets and smartphones in class to assist them with their learning. However, the scholarship recipients are often not able to afford these devices, which results in challenges in both accessing information and completing school tasks. In addition to the challenges of a lack of technology, there were also financial constraints. This was evident

when learners were required to complete school projects and often found it difficult to obtain the necessary resources.

In addition to the above academic challenges, the learners communicated that the standard and difficulty of the work at the independent school differed from that of their previous school. The learners experienced the work as being very challenging in the beginning, but over time they were able to adjust and maintain their ability to excel academically. However, in maintaining this achievement, the scholarship recipients felt that there was a lot of pressure on them to perform, in the fear that they would lose their scholarship, and that their peers did not have this pressure.

Other aspects related to sport and extramural activities and school camps/tours. Although the scholarship recipients experienced a sense of belonging in this regard, there were still challenges. These were mainly financial constraints, as learners were unable to afford the sports equipment that their affluent peers had, which forced them to choose sports based on affordability. In terms of school tours/camps, the financial costs were incurred by either the SSP or the school, thereby promoting two issues of inclusive education, namely access and belonging.

5.2.3 To what extent do learners experience inclusion or possible exclusion and marginalisation?

In terms of learners experiencing inclusion, the data spoke to inclusion in relation to access, participation, and belonging. Learners definitely experienced some form of inclusion in terms of their receiving a scholarship to be “included” into the affluent schooling environment. Furthermore, learners were included and felt a sense of belonging by being able to attend school tours and participate in sport and extramural activities.

In contrast to the findings with regard to inclusion, the data did not reveal any forms of exclusion where learners were entirely left out, discriminated against, or prejudiced, and therefore not able to participate. What is important to note is that learners did, to some degree, experience marginalisation. These experiences of marginalisation were evident in both academic and social situations, and related primarily to the limits of benevolence. Due to the fact that the scholarship recipients came from economically disadvantaged

backgrounds, they did not have the financial means to buy the latest smartphone, tablet, clothes, or other accessories. This was evident when the scholarship recipients claimed that they were unable to participate fully in lessons, as they did not have a smartphone. These experiences of marginalisation were also evident in social situations, resulting in learners withdrawing from conversations.

It can thus be said that scholarship recipients were, by their own account, mostly uncritical of the scholarship programme, and negative responses that they made related mainly to their experience of the limits of benevolence and the challenges of forming friendships and a sense of belonging. Learners did not attribute their negative experiences to marginalisation, but were more explicit in attributing it to their "single story" as being the deserving recipients of a great boon, and that difficulties that they experienced were not sufficient to make them critical of the scholarship opportunity.

5.3 LIMITATIONS OF THE STUDY

Through this study, key questions have been answered. However, this study cannot be rendered plausible if limitations are not acknowledged. In the following section some of the limitations of this study are identified.

5.3.1 LIMITATIONS IN THE DESIGN OF THE STUDY

This research is limited, firstly, due to the small sample size of the schools that participated. Although 16 learners is an acceptable sample size for a qualitative research study of this nature, the data that was collected was limited to four schools. The SSP only provides scholarships for learners to attend certain affluent independent schools in Johannesburg, and not all affluent independent schools provide scholarships for economically disadvantaged learners. This meant that the choice of schools was considerably limited, leaving only a few possibilities. After a manageable number of participants were found from the "available" schools, no other schools were approached. In addition, it was found from the data that scholarship recipients in the same school tended to have similar experiences at school. It is for this reason that the data collected is limited to the experiences of the participants in only four schools, and may not give a true reflection of the experiences of all scholarship recipients. Furthermore, with a small

sample size, generalisations and comprehensive conclusions cannot be drawn from the data.

In addition to the above limitations, it can be argued that by selecting particular learners to participate, we are singling out these learners and accentuating their ‘difference’ in terms of their financial position outside of school. As the research focuses on scholarship recipients, it was essential that these particular learners were selected, in order to hear their experiences, in the hope of improving other learners’ experiences in similar situations.

5.3.2 LIMITATIONS IN THE EXECUTION OF THE STUDY

Besides the above limitations, the execution of the study must be considered. In Chapter 3 the limitations of the data-collection methods and instruments were elaborated on; however, the execution of the data collection proved to have its own limitations. The first limitation in this regard was in relation to the location of the schools and time constraints. Collaborating and meeting with the scholarship recipients proved to be a challenge, due to the location of the schools and the extramural activities of the learners. So, having to meet with learners in the evening on certain occasions could have limited learners’ responses, due to learners wanting to get the individual interview “over and done with”. As a result, learners could have held back important information to keep the interview short. Furthermore, for some learners it was evident that articulating their experiences was difficult and evoked emotions, to the extent that one learner actually cried. For other learners, this may have also been the case, where learners could have held back information to prevent sad or negative emotions from being evoked.

The second limitation was in relation to the journals. Very few learners wrote journal entries, leaving only minimal written data to work with. It was emphasised at the start of the research that learners’ school work should take priority, which possibly left learners with very little free time to dedicate to writing in their journals. Furthermore, the age and gender of the learners could have had an effect on the response to this particular data-collection instrument.

The third limitation was with regard to the photo diary. Although learners were encouraged to take photos of people or places or objects that made them feel included or excluded, it became evident in the second interview that learners did not always follow these instructions and were unable to explain their picture in relation to the interview schedule (see Appendix H).

5.4 STRENGTHS

The methodology adopted for this study would provide valuable and credible information with regard to the research topic. Although the findings cannot be generalised to all scholarship recipients, this research gave 16 learners the opportunity to voice their experiences, both positive and negative, with the hope that both their and other scholarship recipients' experiences can be improved. Furthermore, it allows the four schools to take cognisance of the challenges that learners are experiencing, enabling them to implement certain strategies or support structures to eliminate or mitigate those challenges as much as possible. Schools or other scholarship programmes may also use the findings of this data to consider learner challenges, and they are encouraged to seek an understanding of learners' experiences in their own school or programme.

5.5 RECOMMENDATIONS

5.5.1 FOR SCHOLARSHIP PROGRAMMES AND SCHOOLS

The research revealed through learners' voices that although learners were uncritical of their scholarship, there were limits to these benevolent acts. Furthermore, learners generally expressed their experiences as being good and positive; however, there were significant clauses of conditionality that were revealed. Based on the data, it is recommended that scholarship programmes and the schools know how the financial limits of the scholarship impact learners' ability to participate fully in the life of the school and to share all learning experiences with their peers. Furthermore, educators need to be aware of who the scholarship recipients are, be aware of the challenges that they face, and provide assistance and support if and when necessary.

5.5.2 FOR INCLUSIVE EDUCATION

Recommendations for the field of inclusive education should include the consideration of exclusionary pressures for groups that are not traditionally seen as within the scope of the field. This would entail defining inclusive education more broadly and to consider learners experiencing circumstantial problems, as Weeks (2000) highlighted, as well as extrinsic factors affecting learners' abilities to excel. Although some learners are being included to some extent, this research strongly recommends that communities, schools, and other institutions such as colleges and universities consider that despite inclusion, there are exclusionary pressures experienced by learners, which need to be addressed, so that learners can be included more effectively.

5.5.3 IMPLICATIONS FOR FUTURE RESEARCH

This research could be replicated or expanded upon to include a larger variety of schools and other scholarship programmes that offer scholarships to economically challenged learners. The research could also be extended to include learner experiences in other geographical areas or regions. This would allow a broader spectrum of experiences, as different schools and different scholarship programmes offer learners different kinds of support to make the learners feel included and to eliminate marginalisation as much as possible. Although it would take the focus away from learners' experiences, it could prove valuable to include the voices of principals, teachers, or parents in such a study.

Further investigation also needs to be conducted into the long-term impact of these scholarship programmes, specifically as they relate to the future of scholarship recipients. Much time and financial support is given to learners on scholarship, but it needs to be established whether scholarship recipients are supported in gaining access into higher educational institutions once they complete their schooling career.

In addition, further research could be conducted, with learners first being "trained" in the value of photo diaries and how best to use the camera to express themselves. This may result in learners being able to communicate their experiences more effectively through non-verbal means. Alternatively, other data-collection methods could be used.

5.6 REFLECTIONS ON THE RESEARCH

In carrying out this research, there were times that I found it difficult to maintain the role of researcher, and not become emotionally involved. This was often due to being privileged myself, and on listening to learners' responses to specific research questions, I found myself wanting to get involved personally and assist in supporting them to mitigate some of the difficulties that they were experiencing. For instance, one learner explained in an interview how his cell phone had been stolen, and how his family did not have money to buy him a new phone. As a researcher, I had to bracket out my emotional desire to want to assist him, and merely acknowledge the difficulties associated with the negative experience. In addition to this, there were times when learners became emotional during the interviews, when I had to force myself to maintain my role as researcher and not take on the role of counsellor. This proved to be challenging, as the learners needed to be consoled, to a certain extent, but not counselled.

In terms of writing up the findings of this research, much consideration was given to ensuring that the data was recorded in an objective manner and that it accurately reflected the learners' experiences. As a researcher, I had to acknowledge that I as an individual could not change the experiences of the scholarship recipients. However, through this research, other individuals, schools, and scholarship programmes could take cognisance of the findings and work towards making the experiences of scholarship recipients more positive. The same could be done for groups of learners that are experiencing marginalisation but that would not ordinarily be regarded as experiencing exclusionary pressures.

5.7 CONCLUSION

Learners that receive scholarships to attend affluent independent schools are appreciative of the opportunity, they are confident that they have earned their place in the school, and they are mostly positive about their schooling experience. However, attention should be focused on the possibility that these scholarship recipients could occupy positions in the school as "tenants on the margins" (Slee, 2011). Scholarship recipients are conscious of some of the uncertainties that they experience in the school, in having to satisfy the conditions that govern the awarding of their scholarship. In addition, many scholarship recipients are aware that they cannot participate fully, and that they do not belong fully in

these elite spaces. This research recognises the limitations of the findings, and it does not claim to represent the experiences of all scholarship recipients in all affluent schools. The study does, however, function as evidence for the need for ongoing critical engagement with existing initiatives that endeavour to address educational disadvantage, from as many perspectives as possible, not least of which are the learners that remain behind after those with potential have been chosen. Furthermore, the long-term impact of scholarship programmes needs to be considered, not only in terms of how much they promote access, but also in terms of whether they function to either enable or inhibit the realisation of a socially equitable education system.

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APPENDIX A

(i) INFORMATION LETTER TO THE PRINCIPAL

[Date to be filled in]

The Principal
(Schools name)

Re: Permission to Conduct Research at Your School

My name is Kelly Geyer, and I am a Masters student at the School of Education at the University of the Witwatersrand. As part of my degree I am conducting research within the field of inclusive education with a focus on 'voice research' which aims at listening to the voices of minority learners. This research report is titled "*The Voices of Historically Disadvantaged Bursary Recipient Learners in Affluent Independent High Schools*" and therefore aims to listen to the experiences and perceptions of learners in terms of inclusion, exclusion and marginalisation.

It is my understanding that historically disadvantaged learners are given bursaries to attend your school and this is the reason for your school being selected. Your school's involvement in this study is of vital importance but is however completely voluntary and refusal for your school to be involved or choosing to discontinue involvement during the study will not be held against your school in any way. I would however require your assistance in purposively selecting approximately three learners from the school that I may invite to participate in the research study. Thereafter it would be greatly appreciated if you could assist in facilitating the process of privately contacting and meeting each learner individually to ensure confidentiality from the onset.

Participation will require that the learners, with their consent as well as their parents'/ guardians' / caregivers' consent, partake in four interviews lasting about 40 – 60 minutes which will be audio-taped and transcribed. In addition to this, learners will also be asked to produce a photo diary whereby they will be asked to take photographs to reflect where they feel most included and excluded and developed photos will be returned to the learner upon completion of the research report. All expenses incurred will be covered by myself. Lastly, the learner will be asked to produce a personal journal documenting their experiences. The data collection process will take place within the first and second term after school hours at a time that is mutually convenient. I do not intend interrupting any contact time or interfere with the day to day running of the school.

The data will be documented in a research report and it is envisaged that the research findings be used for academic purposes including books, journals and or conference proceedings and therefore your schools name will never be divulged and all participant details will be strictly confidential. Please be assured that all participant's names and identities will not be mentioned at any point within the research report or any other academic publications. To ensure this confidentiality, pseudonyms will be used. All school participants may also refuse to participate; refuse to answer any questions in the interviews conducted; refuse to generate the photo diary and or personal journal; and may also choose to withdraw their consent at any time during the research study without any negative consequences. There are no foreseeable risks in participating in this study and no form of remuneration will be offered to participants.

All research data will be kept securely in a locked cabinet and will be completely destroyed within 3 – 5 years after completion of the project.
Should you require further information throughout the course of the research, please do not hesitate to contact me on (011) 682 2471 or 083 650 8445 or via kellygeyer4@gmail.com. Alternatively you may contact my supervisor Dr. Elizabeth Walton on (011) 717 3768 or via elizabeth.walton@wits.ac.za.
A summary of the research report and findings will be made available electronically upon finalization in February 2014 should you wish to receive one.

I look forward to your response as soon as is convenient.

Yours sincerely,
Kelly Geyer

(ii) INFORMATION LETTER TO THE CHAIRPERSON OF THE SCHOOL GOVERNING BODY

[Date to be filled in]

The Chairman
(Schools name)

Re: Permission to Conduct Research at Your School

My name is Kelly Geyer, and I am a Masters student at the School of Education at the University of the Witwatersrand. As part of my degree I am conducting research within the field of inclusive education with a focus on 'voice research' which aims at listening to the voices of minority learners. This research report is titled "*The Voices of Historically Disadvantaged Bursary Recipient Learners in Affluent Independent High Schools*" and therefore aims to listen to the experiences and perceptions of learners in terms of inclusion, exclusion and marginalisation.

It is my understanding that historically disadvantaged learners are given bursaries to attend your school and this is the reason for your school being selected. Your school's involvement in this study is of vital importance but is however completely voluntary and refusal for your school to be involved or choosing to discontinue involvement during the study will not be held against your school in any way. I would however require your assistance in purposively selecting approximately three learners from the school that I may invite to participate in the research study. Thereafter it would be greatly appreciated if you could assist in facilitating the process of privately contacting and meeting each learner individually to ensure confidentiality from the onset.

Participation will require that the learners, with their consent as well as their parents'/ guardians' / caregivers' consent, partake in four interviews lasting about 40 – 60 minutes which will be audio-taped and transcribed. In addition to this, learners will also be asked to produce a photo diary whereby they will be asked to take photographs to reflect where they feel most included and excluded and developed photos will be returned to the learner upon completion of the research report. All expenses incurred will be covered by myself. Lastly, the learner will be asked to produce a personal journal documenting their experiences. The data collection process will take place within the first and second term after school hours at a time that is mutually convenient. I do not intend interrupting any contact time or interfere with the day to day running of the school.

The data will be documented in a research report and it is envisaged that the research findings be used for academic purposes including books, journals and or conference proceedings and therefore your schools name will never be divulged and all participant details will be strictly confidential. Please be assured that all participant's names and identities will not be mentioned at any point within the research report or any other academic publications. To ensure this confidentiality, pseudonyms will be used. All school participants may also refuse to participate; refuse to answer any questions in the interviews conducted; refuse to generate the photo diary and or personal journal; and may also choose to withdraw their consent at any time during the research study without any negative consequences. There are no foreseeable risks in participating in this study and no form of remuneration will be offered to participants.

All research data will be kept securely in a locked cabinet and will be completely destroyed within 3 – 5 years after completion of the project.

Should you require further information throughout the course of the research, please do not hesitate to contact me on (011) 682 2471 or 083 650 8445 or via kellygeyer4@gmail.com. Alternatively you may contact my supervisor Dr. Elizabeth Walton on (011) 717 3768 or via elizabeth.walton@wits.ac.za.
A summary of the research report and findings will be made available electronically upon finalization in February 2014 should you wish to receive one.

I look forward to your response as soon as is convenient.

Yours sincerely,
Kelly Geyer

APPENDIX B: INFORMATION LETTER TO PARENT / GUARDIAN / CAREGIVER

[Date to be filled in]

Dear [Parent / Guardian / Caregiver]

My name is Kelly Geyer, and I am a Masters student in the School of Education at the University of the Witwatersrand. As part of my degree I am conducting research within the field of inclusive education with a focus on 'voice research' which aims at listening to the voices of minority learners. This research report is titled "*The Voices of Historically Disadvantaged Bursary Recipient Learners in Affluent Independent High Schools*" and therefore aims to listen to the experiences and perceptions of learners in terms of inclusion, exclusion and marginalisation.

You are receiving this letter as your child has been purposefully selected as a learner receiving a bursary to attend __(schools name)_____school and is invited to partake in the research study. Participation is completely voluntary and there are no negative consequences should you or your child choose not to participate. Participation will involve four interview discussions to determine your child's schooling experiences and perceptions. Each interview will last approximately 40 – 60 minutes and will take place after school hours on school property in term 1 and 2 in 2013 at a time that is mutually convenient. The interviews will, with your permission, be audiotaped and transcribed to ensure accurate recording and analysis of your child's responses. In addition to this, participation will also involve your child producing a photo diary whereby he/she will be asked to take photographs to reflect where he/she feels most included and excluded. A disposable camera will be provided and developed photographs will be returned upon completion of the research report. Lastly your child will be asked to produce a personal journal documenting their experiences. These documents will be used for data analysis.

In agreeing to your child's participation, please be advised that you will not incur any expenses and your son/daughter will not be advantaged or disadvantaged in any way or given any money for participating. Furthermore your child will not be pressurised to answer any questions that he or she is not willing to or comfortable answering. He/she will be reassured that he/she may choose not to participate or choose to withdraw his/her permission at any time during the research study without any penalty or punishment. If you would like a copy of the questions I will be asking, please do not hesitate to contact me using the details given below.

The data will be documented in a research report and it is envisaged that the research findings be used for academic purposes including books, journals and or conference proceedings and therefore it is of utmost importance that your child's details as well as the schools details be kept confidential. In no way will your child's name and identity be mentioned at any point within the study or research report. His / her individual privacy will be maintained at all times. A pseudonym (fake name) will be used to ensure that no-one would be able to recognise your child in any publication or presentation arising from the research. A summary of the findings will also be made available should you be interested.

I guarantee that all research data will be kept securely in a locked cabinet and will be destroyed within 3 – 5 years after completion of the project.

Should you require further information throughout the course of the research, please do not hesitate to contact me on 083 650 8445 or via kellygeyer4@gmail.com. Alternatively you may contact my supervisor Dr. Elizabeth Walton on (011) 717 3768 or via elizabeth.walton@wits.ac.za.

Please complete and sign the attached consent forms and return it to me via your child's class teacher no later than 31 January 2013.

Thank you very much for your help

Yours sincerely,
Kelly Geyer

APPENDIX C: INFORMATION LETTER TO PARTICIPANTS (LEARNERS)

[Date to be filled in]

Dear [Participant's full name]

My name is Kelly Geyer and I am a student at the University of the Witwatersrand School of Education. As part of my degree, I need to do research within the field of inclusive education and I will be focusing on 'voice research'. Voice research is used to listen to and understand how learners feel about their own experiences in school or other situations. My research will be titled "*The Voices of Historically Disadvantaged Bursary Recipient Learners in Affluent Independent High Schools"*. This means I would like to know what it is like to receive a bursary and attend a wealthy private high school.

You are receiving this letter as you have been purposefully selected as a bursary learner and I invite you to take part in this research study. Participation is completely voluntary and there are no negative consequences should you choose not to take part in the research study. Since you are not yet 18 years old, I will also be asking your parents / guardian / caregiver for permission if you would like to participate. If you and your parents / guardian / caregiver agree, participation will involve the following:

- You will be involved in four interview discussions which will last approximately 40 – 60 minutes each. These interviews will take place after school on the school property in term 1 and 2 of 2013. The interview, with your and your parents' / guardian / caregivers' permission, will be audio-taped to make sure accurate information is used. Although the questions may be a bit personal, the questions will not violate your privacy and you will not be forced to answer any questions you are not comfortable answering.
- You will be asked to make a photo diary. This means that a disposable camera will be given to you and you will need to take pictures of places in the school to answer a question. The pictures will be developed (at my expense) and when the study is over, the pictures will be given to you.
- You will also be asked to keep a personal journal which will also be given to you. You will be asked to write about any experiences or events that happened at school or at home that made you feel either happy and part of the school or sad and excluded.

Please understand that your participation is very important in this study but you will not be forced to participate and is therefore your own choice. This is not a test or for marks so if you agree to participate, you will not be advantaged, disadvantaged or paid in any way. It is important that you understand that you are allowed to choose not to participate or to stop participating at any time during the study without any punishment or negative consequences. I do not expect there to be any risks and the hope is that the information may be of benefit in improving the experiences of other learners in the future.

The data will be documented in a research report and it is hoped that the results of this research study will be used for academic purposes such as books, journals and conferences and therefore confidentiality is very important. This means that throughout the study and in all academic writing your name and identity will not be used so no one will know who you are. A pseudonym (fake name) will be used instead of your own. Everything that you say will be private and I will not tell anyone what you have said. I promise that all the information I collect will be safely locked in a cabinet and will be completely destroyed within 3 – 5 years after completion of the project.

If you have any questions during the study, please feel free to phone or sms me on 083 650 8445 or you can e-mail me on kellygeyer4@gmail.com.

Thank you very much for your help.

Kelly Geyer

APPENDIX D: ACKNOWLEDGEMENT OF RECEIPT OF INFORMATION LETTER

(i) PRINCIPAL

***The Voices of Historically Disadvantaged Bursary Recipient Learners in Affluent Independent High Schools*.**

It would be greatly appreciated if you could please acknowledge receipt of the information sheet requesting permission to conduct research in your school.

You will be acknowledging that:

- Involvement is completely voluntary and selected participants may choose not to participate or to withdraw their consent at any given time without any negative consequences.
- You have read and understand the information sheet and acknowledge its contents.
- The school's name and participant's information will be kept confidential and pseudonyms will be used to ensure anonymity.
- Learners' and their parents' / guardian / caregivers' consent will be obtained before data collection begins.
- If upon entering the field it becomes evident that the participants parents / guardian / caregiver is unable to read and or understand the information and consent forms, I undertake to have them translated at my own expense. Alternatively I will arrange a home visit with a translator to ensure parents / guardian / caregivers are aware of what they are consenting to.
- The data collection process will not interfere with the day to day running of the school, nor will it interfere with the learners' schoolwork.
- It is envisaged that the research findings will be used for academic purposes including books, journals and or conference proceedings.
- Should any of the photographs that learners take have significant illustrative value and merit publication, consent will be obtained from the school per picture before proceeding to publish.

I, _____ (*Principal's full name*) acknowledge the information stated above and grant permission for Kelly Geyer to conduct research within _____ (*school's name)* in 2013.

Please provide details should you wish to receive an electronic summary of the research findings.

E-mail address: _____

Principal's Signature: _____ Date: _____

(ii) CHAIRPERSON OF THE SCHOOL GOVERNING BODY

***The Voices of Historically Disadvantaged Bursary Recipient Learners in Affluent Independent High Schools*.**

It would be greatly appreciated if you could please acknowledge receipt of the information sheet requesting permission to conduct research in your school.

You will be acknowledging that:

- Involvement is completely voluntary and selected participants may choose not to participate or to withdraw their consent at any given time without any negative consequences.
- You have read and understand the information sheet and acknowledge its contents.
- The school's name and participant's information will be kept confidential and pseudonyms will be used to ensure anonymity.
- Learners' and their parents' / guardian / caregivers' consent will be obtained before data collection begins.
- If upon entering the field it becomes evident that the participants parents / guardian / caregiver is unable to read and or understand the information and consent forms, I undertake to have them translated at my own expense. Alternatively I will arrange a home visit with a translator to ensure parents / guardian / caregivers are aware of what they are consenting to.
- The data collection process will not interfere with the day to day running of the school, nor will it interfere with the learners' schoolwork.
- It is envisaged that the research findings will be used for academic purposes including books, journals and or conference proceedings.
- Should any of the photographs that learners take have significant illustrative value and merit publication, consent will be obtained from the school per picture before proceeding to publish.

I, _____ (*SGB Chairman's full name*) acknowledge the information stated above and grant permission for Kelly Geyer to conduct research within _____ (*school's name)* in 2013.

Please provide details should you wish to receive an electronic summary of the research findings.

E-mail address: _____

SGB Chairman's Signature: _____ Date: _____

APPENDIX E: PARENT / GUARDIAN / CAREGIVER CONSENT FORMS

Participation in the research project:

***The Voices of Historically Disadvantaged Bursary Recipient Learners in Affluent Independent High Schools*.**

Parent / Guardian / Caregiver: Informed consent for individual interviews

I, _____ (*parent / guardian / caregiver's full name*)

Give consent ☐ / Do not give consent ☐

for my child to participate in the research project by partaking and answering questions in four interview discussions

I acknowledge that:

- I have read and understand the information sheet.
- My child's participation is completely voluntary and may choose not to participate or choose to withdraw from the study at any time without there being any negative consequences. He/she will also not be advantaged, disadvantaged or reimbursed in any way.
- My child will not be pressurised to answer any questions that he or she does not want to answer.
- The researcher will keep my child's identity and all information strictly confidential in all academic writing including books, journal and conferences by using a pseudonym (fake name).

Parent Signature: _____ Date: _____

Participation in the research project:

The Voices of Historically Disadvantaged Bursary Recipient Learners in Affluent Independent High Schools.

Parent / Guardian / Caregiver: Informed consent for audio-recording and transcribing individual interviews.

I, _____ (*parent / guardian / caregiver's full name*)

Give consent ☐ / Do not give consent ☐

to have my child's interview responses audiotaped and transcribed for all interview discussions

I acknowledge that:

- My child's participation is completely voluntary and may choose not to participate or choose to withdraw from the study at any time without there being any negative consequences. He/she will also not be advantaged, disadvantaged or reimbursed in any way.
- The researcher will keep my child's identity and all information strictly confidential in all academic writing including books, journals and conferences by using a pseudonym.
- The audio recordings will be used for data collection and to ensure accurate recording and analysis of responses.
- My child's audiotaped and transcribed responses will be kept securely in a locked cabinet and destroyed between 3 – 5 years after completion of the project.

Parent Signature: _____ Date: _____

Participation in the research project:

The Voices of Historically Disadvantaged Bursary Recipient Learners in Affluent Independent High Schools.

Parent / Guardian / Caregiver: Informed consent for the use of documents

I, _____ (*parent / guardian / caregiver's full name*)

Give consent ☐ **/ Do not give consent** ☐

for documentation that is generated by my child to be used for this research project

I acknowledge that:

- I have read and understand the information sheet.
- My child's participation is completely voluntary and may choose not to participate or choose to withdraw from the study at any time without there being any negative consequences. He/she will also not be advantaged, disadvantaged or reimbursed in any way.
- All documents produced (photo diary and personal journal) will be used for data analysis for this study only.
- All documents collected will be kept securely in a locked cabinet. Photographs will be returned after data analysis and the rest destroyed between 3 – 5 years after completion of the project.

Parent Signature: _____ Date: _____

APPENDIX F: PARTICIPANT (LEARNER) CONSENT FORMS

Participation in the research project:

***The Voices of Historically Disadvantaged Bursary Recipient Learners in Affluent Independent High Schools*.**

Learners' informed consent for individual interviews

I, _____ (*participant's full name*)

Give consent ☐ / Do not give consent ☐

to participate in the research project and individual interviews.

Please tick either the yes or no block to show that you understand what it will mean to consent and participate:

- I have read and I understand the information sheet. Yes ☐ / No ☐
- My participation is completely voluntary and may choose not to participate or to withdraw from the study at any time without any punishment or negative consequences. I will also not be advantaged, disadvantaged or paid for participating. Yes ☐ / No ☐
- I do not have to answer any questions I don't feel comfortable answering. Yes ☐ / No ☐
- My name and all information about me will be strictly confidential in all academic writing including books, journal and conferences by using a fake name (pseudonym). Yes ☐ / No ☐

Signature: _____ Date: _____

Participation in the research project:

The Voices of Historically Disadvantaged Bursary Recipient Learners in Affluent Independent High Schools.

Learners' informed consent for audio-recording and transcribing individual interviews.

I, _____ (*participant's full name*)

Give consent ☐ **/ Do not give consent** ☐

for all interviews to be audiotaped and transcribed

Please tick either the yes or no block to show that you understand what it will mean to consent and participate:

- My participation is completely voluntary and may choose not to participate or to withdraw from the study at any time without any punishment or negative consequences. I will also not be advantaged, disadvantaged or paid for participating.
  Yes ☐ / No ☐
- My name and all information about me will be strictly confidential in all academic writing including books, journals and conferences by using a fake name (pseudonym).
  Yes ☐ / No ☐
- The audio recordings will be used to make sure the researcher uses exactly what I answered in the interview questions. Yes ☐ / No ☐
- All audiotaped and transcribed responses will be safely kept in a locked cabinet and completely destroyed between 3 – 5 years after completion of the project.
  Yes ☐ / No ☐

Signature: _____ Date: _____

Participation in the research project:

The Voices of Historically Disadvantaged Bursary Recipient Learners in Affluent Independent High Schools.

Learners' informed consent for the use of documents

I, _____ (*participant's full name*)

Give consent ☐ **/ Do not give consent** ☐

for documents I make to be used for this research project

Please tick either the yes or no block to show that you understand what it will mean to consent and participate:

- I have read and I understand the information sheet. Yes ☐ / No ☐

- My participation is completely voluntary and may choose not to participate or to withdraw from the study at any time without any punishment or negative consequences. I will also not be advantaged, disadvantaged or paid for participating.
  Yes ☐ / No ☐

- The photographs and personal journal I make will only be used for this study and will never be used again. Yes ☐ / No ☐

- The journal will be used for data analysis and will be discussed in the interviews. The photographs will also be discussed in the interviews and will be returned when the project is finished. Yes ☐ / No ☐

- All documents collected will be safely kept in a locked cabinet and completely destroyed between 3 – 5 years after completion of the project.
  Yes ☐ / No ☐

Signature: _____ Date: _____

Participation in the research project:

The Voices of Historically Disadvantaged Bursary Recipient Learners in Affluent Independent High Schools.

Appropriate use of technology agreement

By agreeing to participate in the research study you will be asked to make a photo diary. For you to complete this task a disposable camera will be given to you and the cost for developing the photographs will also be covered.

It is important that the camera is used properly and this means:

- You will have to be responsible and look after the camera properly.
- Take photographs of places that the research question is asking and not for any other reason.
- You will not abuse the camera.

I, _____ (*participant's full name*) agree to the above criteria and promise to use the camera to take pictures that are relevant to the research question only.

Signature: _____ Date: _____

APPENDIX G: INTERVIEW 1 PROCESS AND QUESTION SCHEDULE

INTRODUCTION

Formally introduce myself as the researcher and clarify any uncertainties with regards to the purpose of the research as stipulated in the information letter. Exchange contact information to keep in contact throughout the duration of data collection and thereafter if needed.

Remind the learners of the interview protocols:

- What each of the two interviews will entail.
- Their right to withdraw from the study at any given time.
- Re-assure participants of confidentiality and that a pseudonym will be used. Allow them the opportunity to select a pseudonym.
- Their right to refuse to answer any questions they are not comfortable answering.
- Their right to withdraw any information given during the course of the study.

PROCEED WITH QUESTION SCHEDULE

1. What area do you come from?
2. What is your home life like there?
    a. Does your family provide a lot of support for you at school?
    b. Are they happy that you are in this school?
    c. Do your friends at home support the fact that you are in this school?
3. What was your previous school like compared to this school?
4. Why do you think you were given a bursary to come to this school?
5. What is the academic work like for you?
    a. What support do you get when you struggle don't understand work?
6. What is your social life like at school?
    a. Do you have many friends or different groups of friends?
    b. What extra-mural activities do you partake in?
7. What is it like to go home on weekends and in school holidays?
    a. What is it like to return to school after weekends and holidays?

8. In what ways do you feel the same as or different to your peers?
9. If your family was wealthy and paid your school fees, do you think your school experience would be different? Please explain.
10. What would you say if a close friend or family member was given the same opportunity as you?
    a. Do you think it would be beneficial to them? Why?

Allow the learner to say or add anything further.

PHOTO DIARY AND JOURNAL

These two tasks will be given to the learner to complete between the scheduled interviews and to be discussed in interview two. Explain each task to the learner and what they will be required / expected to do.

1. Photo Diary

- The learner is given a disposable camera and their responsibility and use of the camera as mentioned in the "Appropriate use of technology agreement" is further explained.
- Reinforce the notion of confidentiality and that should any students or teachers appear in any of the pictures, no one other than the researcher and their supervisor will see. Explain that the pictures will be discussed in the interviews. Should any picture merit publication, consent will be obtained from the school. The pictures will be safely locked away until the research project is complete. Thereafter the pictures will be returned to the learner.

Photo diary task

- Ask the learner to take pictures of the following, :
    - People / Places / Objects at school that make you feel safe and happy or where they feel sad, unsafe and or vulnerable
    - People / Places / Objects at school that make you feel like you are included and no different to any other learner in the school.
    - People / Places / Objects at school that make you feel excluded and different from other learners.

2. Journal

- The learner is given a journal.
- Reinforce the notion of confidentiality and that should any students or teachers names appear in any of the journal entries, no one other than the researcher and their supervisor will know. Explain that the journal will be used for data analysis and that some of it may be published in the research report. The journal will be safely locked away and destroyed 3 – 5 years after completion of the project.

Journal task

The following questions / statements will be stuck inside the journal so that the learner may use them as a guide when writing each journal entry or may answer / respond to a specific question / statement to compile a journal entry. Encourage the learners to write at least one entry per week, if more than one 'incident' was experienced, they are encouraged to write more.

Some questions to help you.

1. How do you feel about being a bursary student?
2. A positive or your best experience you have had in the school.
3. A negative or your worst experience you have had in the school.
4. A time you felt like you were singled out / excluded and treated differently because you are a bursary recipient.

5 Do you feel that you and your peers are given equal opportunities?

6. A time when you felt that the school and or teachers expected more from you than other students because you received a bursary.
7. What is it like for you to be going to school with boys / girls who are from very wealthy families?
8. Things you would possibly like to change or see changed to make school more positive for you.

Thank the learner for their participation and allow them the opportunity to ask any questions. Discuss a possible date for collection of camera to develop photos in preparation for the next interview.

APPENDIX H: INTERVIEW 2 PROCESS AND QUESTION SCHEDULE

DISCUSSION

Discuss any questions that may have arisen from the previous interview with regards to:

- Answers from the interview schedule that need clarification.
- Any questions the participant may have.
- Offer the learner the opportunity to change or withdraw anything that was said in the previous interview. Transcripts will be available for learner's perusal should they wish to view them.
- Ask learners if the have any questions, comments or concerns.

PHOTO DIARY

Question guide to discuss each photo:

- What caption or title would you give this photo?
- Explain the photo.
- What was the reason behind you taking this photo?
- How do / did you feel when you are / were in this environment or around this person?
  - What causes you to feel this way?
  - What reaction or emotion would you prefer to have / feel?
- Do you think any other learners experience this? Please explain.
- If you could, what would you like to see changed?
- How would this make you feel

JOURNAL

Allow the learner to discuss or further clarify any journal entry should they wish to do so.

MESSAGE IN A BOTTLE QUESTION

The learner is asked the following question:

- If you were given **one** opportunity to send a message to another planet or country or to a famous person telling them what you would like to change in your school to possibly make your school experience more positive, what would you say? And why?

CONCLUDING QUESTIONS AND COMMENTS

- Ask the learner what they hope this research will achieve.
- Allow the learner the opportunity to add or say anything further.
- Thank the learner for their participation. Encourage learners to contact you at any time should they wish to withdraw anything that has been said, any photo that was taken or any journal entry.

APPENDIX I: ETHICS COMMITTEE CLEARANCE LETTER

Wits School of Education

27 St Andrews Road, Parktown, Johannesburg, 2193 Private Bag 3, Wits 2050, South Africa
Tel: +27 11 717-3064 Fax: +27 11 717-3100 E-mail: enquiries@educ.wits.ac.za Website: www.wits.ac.za

Student Number:
512130

Protocol Number:
2012ECE182

Date: 23-Nov-2012

Dear Kelly Geyer

Application for Ethics Clearance: Master of Education by Coursework

Thank you very much for your ethics application. The Ethics Committee in Education of the Faculty of Humanities, acting on behalf of the Senate has considered your application for ethics clearance for your proposal entitled:

The Voices of Historically Disadvantaged Bursary Recipient Learners in Affluent Independent High Schools.

The committee recently met and I am pleased to inform you that clearance was granted.

Please use the above protocol number in all correspondence to the relevant research parties (schools, parents, learners etc.) and include it in your research report or project on the title page.

The Protocol Number above should be submitted to the Graduate Studies in Education Committee upon submission of your final research report.

All the best with your research project.

Yours sincerely

MMabeta

Matsie Mabeta
Wits School of Education
011 717 3416

Cc Supervisor: Dr. E Walton