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# SOFIE Newsletter

Issue 2

October 2008

*The SOFIE research project aims to increase access to education and learning for young people living in high HIV prevalence areas in Malawi and Lesotho, by developing a new, more flexible model of education that uses open, distance and flexible learning (ODFL) to complement and enrich conventional schooling*

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## Schools should look and feel different in high HIV prevalence areas of sub-Saharan Africa

### Foreword

The SOFIE Project has progressed well since the first newsletter was published. Team members are to be congratulated on the research out puts so far - the background review papers have been published on SOFIE website and detailed case studies to further illuminate the factors influencing access to schooling and to achievement for young people affected by HIV and AIDS in Malawi and Lesotho will be published by the end of October. In June the SOFIE team met up at the Centre for Educational Research and Training in Zomba, Malawi to review progress and plan the next steps. Pat Pridmore presented a new model of schooling drawing on the findings from the literature reviews and this model was then further developed and adapted by the team in line with preliminary findings from the case studies from Malawi presented by Catherine Moleni and from Lesotho by Thabiso Nyabanyaba. The team has also been entering into dialogue with a wide range of stakeholders at community, government and development agency levels. The ideas have been presented to colleagues attending the 5<sup>th</sup> Pan Commonwealth Forum on Open Learning (PCF5) held in London in July. Matthew Jukes has arranged for the SOFIE project to be presented to students and staff at Harvard University in December.

The SOFIE team is now at the detailed planning stage for the intervention that will be carried out through schools from January 2009-2010. The new model of schooling to be trialed aims to strengthen existing structures and build on what is already available in the schools and communities.



© Catherine Moleni

It involves building a circle of support around each child who is at risk of falling behind or dropping out. 'At risk' children will receive a 'school in a bag' and be encouraged to attend a Saturday morning club together with their class buddies. At this club the youth leader will have a 'school in a box', which will include locally available learning materials as well as a learner guide written by Chris Yates. Teachers will monitor progress and school management groups will oversee the delivery of a range of small activities that they feel will be supportive of learning. The intervention will be evaluated using an experimental design with support from Matthew Jukes.

The SOFIE Project outputs and the numerous dissemination activities carried out by team members are making an important contribution to EFA agenda building for new, more open models of learning.

*Pat Pridmore, Principal Investigator*

## SOFIE News

### Second Team Workshop held in Zomba, Malawi

In July, members of the research team travelled from England, America, Lesotho and South Africa to join their colleague in Malawi for a one week team workshop to review progress and plan the next steps.

At the start of the workshop Pat Pridmore synthesised the findings from the earlier background review papers and, based on these findings, presented for critical comment a more open and flexible model of schooling as a contribution toward planning for the school-based intervention that will start in January 2009. The intervention is intended to better support the learning of young people living in high HIV prevalence areas who are at risk of dropping out or grade repetition.



**Head teachers from the case study schools doing a SWOT analysis on the intervention model © Pat Pridmore**

Catherine Moleni and Thabiso Nyabanyaba presented the preliminary findings from the case studies that have just been carried out in Malawi and Lesotho respectively. (These case studies will be published on SOFIE website very shortly). The new model of schooling was then considered in relation to these fieldwork findings and further refined and contextualised.

Matthew Jukes lead a discussion on how the new model of schooling could be robustly evaluated in the current climate using an experimental design. Chris Yates lead a session to indentify the contents of the intervention package that would be needed to support the new model of schooling and, with support from Ephraim Mhlanga, addressed the need for additional open learning materials to be written in the form of teacher/learner guides. Rough costings were made for the materials needed.



**Schools and community stakeholders with SOFIE team members © Pat Pridmore**

During the visit every opportunity was taken to share the new model of schooling at all levels. Discussions were held with members of the Project Advisory Group in the Ministry of Education and at DFID, with school head teachers, teachers and students and with members of school management committees. These discussions are currently ongoing in Lesotho and support for the intervention is being built up in both countries.

The workshop programme included a visit to one of the case study schools for the team to become more familiar with the context of teaching and learning in a rural Primary School. The team was also invited to attend the launch of the Malawi Educational Research Association (MERA) and asked to present the Project findings and receive critical comment on the new model of schooling. The workshop concluded with some detailed action planning for the next phase of the Project. Plans were also drawn up for future SOFIE publications and for assessing the influence/ impact of the Project.



**© Pat Pridmore**

Despite the ease and frequency of internet/telephone communication between team members the annual team workshops undoubtedly provide 'added value'. They help the team to develop and maintain a shared vision for the Project, to contextualise the research, build research capacity and plan together. We all look forward to meeting up again at our third and last team meeting in December 2009 in Lesotho.

*Pat Pridmore, Principal Investigator*



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## Advisory Group Teleconference

On Thursday 25<sup>th</sup> September the SOFIE project held a two-country teleconference linking up members of the Advisory Group in UK and Lesotho with members of the SOFIE project team in London. Ms Montseng Mofokeng from the Lesotho Ministry of Education and Training and Professor Julia Preece (National University of Lesotho) joined Dr Caroline Pontefract (Commonwealth Secretariat - London), Dr Carrew Treffgarne (DFID - London) and three members of the SOFIE research team Dr Pat Pridmore, Ms Mirella Harri and Mr Chris Yates primarily to discuss the strengths and weaknesses of the proposed SOFIE

intervention model. The intervention model based on the 'Circles of Support' idea from South Africa and planned for use in January-December 2009 with at risk pupils in Malawi and Lesotho was discussed by the group. The SOFIE team received some helpful advice on the proposed intervention from the Advisory Group. We plan to hold a number of other teleconferences in the future with the full advisory group both Malawi and Lesotho as we move the project forward to its next phase.

*Chris Yates, Co-investigator*

## The Fifth Pan-Commonwealth Forum on Open Learning (PCF5) 13-17th July 2008 at the University of London

This international conference brought together over 700 practitioners, researchers, planners and policy from 70 countries to explore the contribution of open and distance learning to international development goals, by opening up access to learning at every level. More than 300 papers can be accessed at [www.wikieducator.org/PCF5](http://www.wikieducator.org/PCF5)

The keynote address for the Health Theme, given by Professor Lidia Brito, highlighted the importance of access to learning for health with reference to HIV/AIDS and set the context for the paper presented by Pat Pridmore on the SOFIE Project.

Pat Pridmore's paper provides a synthesis of the findings from the background review papers published on the SOFIE website on the factors that influence access to schooling in high HIV prevalence areas of sub-Saharan Africa and then draws on these findings to present an early version of the new more open and flexible model of schooling that has been further refined and contextualised by the SOFIE team for the Project intervention.

The new model of schooling seeks to increase access to education and learning through delivering the curriculum more flexibly and by strengthening existing structures and network. This model acknowledges the need to start where the teachers, schools and their communities are now (in terms of pedagogic practices, availability of learning materials, management capacity, and capacity and motivation to take on additional responsibilities) and to build on what they are already doing. It also takes account of the need for a low cost intervention to enable it to be replicated if successful, the lack of electricity in some of the schools and the need to continually facilitate community participation for local ownership, knowledge sharing and empowerment.

This paper is available at

[www.wikieducator.org/images/b/bc/PID\\_292.pdf](http://www.wikieducator.org/images/b/bc/PID_292.pdf)

*Pat Pridmore, Principal Investigator*

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## Case studies

### Factors influencing access and retention in primary schooling for vulnerable children, including those affected by HIV and AIDS: Preliminary Findings from Case Studies in rural Malawi

#### Introduction

The purpose of the case studies was to identify and explore factors that influence access to primary education for orphans and other children made vulnerable by HIV and AIDS and to examine the extent to which schools provide specific support for these children. In addition, the findings will be used to inform the development of a school-based intervention to be piloted in 2009.

The first phase of this study, which took place in February – April 2008, involved the development and piloting of a case study research design in one school in Zomba Rural, followed by detailed case studies in four rural schools in Phalombe and Mzimba South. During visits to schools and their surrounding communities, data collection included: initial participatory activities with teachers, pupils and school dropouts followed by follow-up interviews with selected children and their parents or guardians at their households; focus group discussions with teachers and community members; interviews with key informants and collection of school data from selected records. A summary of the preliminary findings of the first phase of the SOFIE research study are presented below.

#### Key Issues

##### **Poverty and a lack of basic needs**

One key set of constraints identified across all case study schools relates to the impoverishment of households affected by HIV and AIDS, as illness and mortality reduce household productivity and food security and households face additional costs associated with medical care and funeral expenses. Facing the often multiple and cumulative impact of illness and death of adult members of households, children could find themselves left fending for themselves or in the care of households struggling to support the costs of hosting additional children. This resulted in the increased vulnerability of many households and children regularly facing a lack of even the most basic of necessities. A lack of food in households was said to impact directly on pupils' performance and to increase absenteeism. A lack of adequate clothing and money for related items such as soap was another concern raised by many participants.

Pupils, particularly girls, were said to feel shy and uncomfortable attending school in torn or dirty clothes, often to be teased by fellow pupils, and might prefer to absent themselves.



Pupils ranking reasons for absenteeism and dropout from school © Catherine Moleni

##### **Household responsibilities, chores & ganyu**

A second major socio-economic factor that influences the access to learning and retention of children affected by HIV and AIDS is the increased requirement for children's work to supplement the labour capacity of households and provide much-needed income. Many of the young people interviewed had been involved in *ganyu* -low-paid, labour-intensive work. For several of them this had resulted extended absence from school or permanent dropout. In addition to work outside the home, children, especially girls, would take on the role of caring for sick parents, escorting them to seek medical care and collecting medication. If the mother was sick, with no other elder female in the households, the brunt of the household chores would fall to girls. In some cases, children's excessive involvement in household tasks appears to stem from deliberate discrimination within households.

##### **Fragmented households**

The fragmentation and migration of household members in response to the impact of HIV and AIDS can also influence children's access to schooling. Interviews with young people revealed several instances of children re-locating during a period of ill-health of a parent

which usually coincided with a withdrawal from school. Similarly, following the death of a parent or guardian, children might move between households as remaining family members attempt to accommodate them or surviving spouses return to their home areas.

### **Psychosocial issues**

Findings from the case studies also underline the psychological impact of HIV and AIDS on children and how, in turn, this affects their participation in schooling. Times of chronic ill-health or death of a parent are times of great anxiety for children and concern over their future. How they respond to this varies, to some extent, on the individual resilience of the child, but also with regard to their recourse to continuity of care and support and how they perceive the responses of others to their predicament.

### **School environment, discipline and harassment**

Another key set of constraints identified by these case studies relate directly to the school experiences of children and young people affected by HIV and AIDS. Understaffing and large class sizes, whilst impacting negatively on the learning of all pupils, also mean that teachers have little time or motivation to address the specific learning and emotional needs of children affected by HIV and AIDS. Little, if any remedial teaching or homework is offered at schools for children who have been absent or require additional learning support and there are few opportunities for independent learning. Identification, monitoring and follow-up of pupils regularly absent or at risk of dropout was limited.

Although all children denied facing any specific discrimination from teachers on the basis of their orphan status, many young people perceived teachers' disciplinary practices as harsh and unfair. Corporal punishment, although banned in Malawi, was visible in case study schools. The most disturbing example of teachers' abuse of their authority was their sexual harassment of female pupils. This was raised as an issue at three of the case study schools. In addition to school regulations and practices that directly curtail access to learning (e.g. exclusion of pupils without uniform), there is a danger that the observed adoption of a moralistic, scare-mongering approach for teaching about HIV and AIDS further isolates pupils affected by HIV and AIDS.

### **Providing support**

Besides exploring the constraints and barriers to education for children affected by HIV and AIDS, these case studies also attempted to highlight some of the factors that support the access and continued retention of such children. Interviews with parents and guardians generally revealed positive attitudes to education and most expressed satisfaction

with the schooling provided. Many of the young people interviewed also held positive attitudes to education and saw completion of schooling as a means to escape their poverty and secure a stable, independent future. In addition to their personal motivation, several pupils spoke of individuals within their households or extended families who provided emotional support and encouragement to continue with school. Furthermore, several pupils had some recourse to financial support for their school needs beyond the immediate household. A few took up *ganyu* and other income generating activities to fund their own schooling costs.



Teachers sharing ideas during participatory activities © Catherine Moleni

## **Implications**

The range and multi-factorial nature of the constraints emerging from these case studies suggests that the proposed school-based intervention package requires a holistic approach, supporting the learning, social and emotional needs of orphans and other children affected by HIV and AIDS. Any intervention would be required to address barriers specific to the impact of HIV and AIDS on households and individual children, as well as more general constraints on pupils' access to learning and retention, which could have a disproportionate effect on children made vulnerable by HIV and AIDS. Thus, these case studies suggest that general changes in school policy and practice to increase the accessibility and inclusiveness of schools for *all* vulnerable groups would greatly benefit those affected by HIV and AIDS. However, such an approach should not ignore the specific educational disadvantages faced by affected children and young people.

*Catherine Moleni*, CERT, Researcher

For the complete briefing report, please visit [www.ioe.ac.uk/sofie](http://www.ioe.ac.uk/sofie)

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## Case studies

### Exploratory case study of four high HIV and AIDS prevalence rate contexts in Lesotho

As part of the second phase of the SOFIE study, case studies were conducted in contrasting communities in Lesotho to gain insights into what was happening to children's access to schooling and to attainment in high HIV prevalence areas.

As was indicated in my earlier report ([www.ioe.ac.uk/sofie/publications.html](http://www.ioe.ac.uk/sofie/publications.html)), Lesotho's education system is extremely wasteful in terms of children who finally reach the end of school and attain meaningful competencies. Moreover, secondary schooling in Lesotho has been rated as one of the most inaccessible systems in the world. Now, in the face of growing poverty and HIV and AIDS, schools do need to feel and do things differently in order to attract and retain children facing the prospect of under-achieving and dropping out of school.

A wide variety of socio-cultural background features are found in the different locations in Lesotho. Three of the cases were conducted in deeply rural areas where traditional practices such as initiation school persisted. One case was selected for its location in a semi-urban (lowland) area, noted for its low access rates and high prevalence rates.

Several methods and multiple sources of data were used, including interviews, focus group discussions, document collection, informal observation and participatory tools used during mini-workshops.

Children from households affected by HIV and AIDS were sampled as a sub-group of a wider sample of orphans and other vulnerable children. The age of pupils who were interviewed ranged from 15 to 18 years for in-school and 15-24 years for out-of-school.



Researcher giving a lift to pupils going to school  
© Thabiso Nyabanyaba

More than half of all children/youth interviewed were double orphans.

In addition to the children and young people in the sample, several other groups of people participated in the research: guardians of interviewed children, teachers, School Management Committee members, parents and several key informants living and/or working in schools' community areas.

Some of the preliminary findings of the case studies presented below.

#### Relevance of Education

One key finding of the study was the apparent low value accorded to education in the mountain areas. There is a tendency in Lesotho to keep boys out of school in order to attend to economic activities. Boys as young as seven are expected to drop out of school to look after cattle, leaving home for months at a time and sometimes having to face exposure to isolation in remote cattle posts, extreme weather conditions including snow, as well as physical and sexual abuse by older herd boys. It was also evident that such cultural practices as initiation schools and early marriages for girls were competing with schooling. Thus, it can be argued that part of the reason why children stay out of school in rural areas in particular, is the apparent irrelevance of education to immediate social reality.

#### Poverty

As noted in the literature review, Lesotho has one of the poorest promotion and retention rates amongst countries in the Region. Part of the background to these poor figures has to do with the declining socio-economic context in the country. A common cause of poor attendance across schools in the study was described as poverty and the inability by many parents to raise fees for their children.

Poverty had a gendered impact on attendance. For example, in rural schools members of management teams described how it had become common for children to take turns to attend school in order to earn income for the family. In addition to boys who have often been called upon to take turns going to school in order to look after



animals, growing poverty has resulted in an increase in the incidence of girls also being forced to take turns attending school in order to look after younger siblings or ailing family members, or being withdrawn in order to be hired out as domestic workers. While girls are still less likely to be withdrawn from school as a result of poverty they tend to feel the impact of poverty more acutely than their male counterparts. Many girls stated that they were unable to go to school if they have no shoes and school uniform.

There is a significant difference in the drop out rates in mountain schools compared to the foothills and lowland schools. This suggests a possible scenario where pupils in these schools have more opportunities to remain within the schooling system, whilst those in the rural schools are quicker to leave permanently. In both of the case study mountain schools the dropout was said to be strongly associated with household poverty and the ability to afford school fees.

### HIV and AIDS

Some community members remained rather reserved about HIV and AIDS and were unprepared to link the disease directly to high dropout rates. However, most participants related the growing incident of double orphanhood to HIV and AIDS and described its negative impact on attendance and retention in school. The loss of both parents was described as leading to high levels of distraction for affected children. More directly the continuing stigmatisation and discrimination of children regarded as HIV affected impacted negatively on school attendance and retention and put such children at a specific disadvantage over other vulnerable children.

In school, the impact of HIV and AIDS was reported to have had a huge impact on the morale of teachers and school management, with many teachers unable to cope. More than other disadvantaged children, it was pointed out that students coming from household affected by HIV/ AIDS do not get so many chances to learn and participate in school activities because most of the times, they come to school without food.

### Fragmented Households and Family Cohesion

A common reason for poor attendance in these schools was child-headed households. But even more notable was the growing



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incident of children being left in the care of relatives, particularly grandparents. In the care of relatives, many of these children are often victims of the choices such families have to make in order to keep their own children in school. It was with a great deal of gratitude and understanding that one out-of-school youth described how her aunt assisted in keeping her in school. The absence of someone who monitors the children's attendance was described as having a significant impact on attendance and retention. Many children who are heading households, and especially those who have dropped out of school, said they simply miss the support they used to benefit from when their parents/guardians were still guiding them.

### Concluding comments

It is quite apparent from the data collected in this study that many children are struggling to remain in school as a result of a variety of socio-economic challenges and cultural practices, but particularly the impact of HIV and AIDS and extreme poverty. What was most stark in terms of orphaned and vulnerable children was the extent to which they mentioned poverty as the main reason why they drop out of school and the source of their misery. Whilst the extent and reasons for poor attendance and withdrawal from school differed amongst the four case study schools, key informants in several of these schools believed that changing attitudes of parents and children towards education and was a key to improving access and that interventions could help to improve pupil attendance especially for children affected by HIV and AIDS. Moreover, key informants from all four schools agreed that teachers and communities need a lot of training on psycho-social support and on how to provide support to pupils trying to survive in the face of growing poverty.

*Thabiso Nyabanyaba, National University of Lesotho, Researcher*

The case study report will be published on SOFIE website [www.ioe.ac.uk/sofie](http://www.ioe.ac.uk/sofie)

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## SOFIE publications, meetings and activities

### Soon to be published on SOFIE website [www.ioe.ac.uk/sofie](http://www.ioe.ac.uk/sofie)

Moleni, C. (2008) Factors influencing access and retention in primary schooling for children and young people affected by HIV and AIDS: Case studies from rural Malawi. *SOFIE Opening Up Access Series no.6*

Nyabanyaba, T. (2008) The use of Open, Distance and Flexible Learning (ODFL) initiatives to overcome barriers to education: Exploratory case study of four high HIV and AIDS prevalence rate contexts in Lesotho. *SOFIE Opening Up Access Series no.7*

### Team meeting

The next and final team meeting will be held in Lesotho in December 2009.

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