

UNDERSTANDING THE EDUCATIONAL NEEDS OF ORPHANS IN MALAWI. FINAL REPORT¹

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Background and Objectives

Background

It sounds emotional and trite to say that "Malawi is dying" but this is a serious comment we recorded from a university lecturer. During one, three week period, large parts of Chancellor College, University of Malawi, were effectively closed on three separate occasions as staff attended funerals of colleagues and well known friends. Malawian funerals can last for twenty four hours as bodies are taken to village resting places. It is not at all unusual to find roads covered with branches to tell passers-by that someone has died nearby.

At the end of 1999 16% of all Malawians between 15 and 49 years were HIV positive, according to the World Health Organisation [see UNAIDS 2000, attachment]. In the same year:

"UNAIDS estimated that approximately 390 000 children in Malawi were AIDS orphans [losing their mother or both parents] out of a total of approximately 600 000 orphans. By 2005, AIDS is expected to account for almost 75% of all orphaned children. The increasing number of orphans combined with the decreasing capacity of families and communities to cope and assist with the children, has made them a very vulnerable group." [UNAIDS, 2001 p 6]

The quantification of this context is important for policy development, financial planning and for the eventual administration of the HIV/AIDS epidemic but the vast majority of Malawians are not aware of these figures and make decisions about their lives without an understanding of this sheer numerical enormity. This small project has sought to conduct in-depth research into the lives of orphans, their basic needs and the educational needs. Much of this has centred on building an understanding of the perceptions, decisions and actions of orphans and their carers and to elaborate their views of the constraints they face. Conclusions emerging from this fieldwork were triangulated with appropriate agencies and ministries and have already begun to influence policy development in Malawi.

Objectives

The study sought to:

1. give an account of what constitutes orphanhood;
2. investigate the lives of orphans in an area of Malawi;
3. establish the life histories of orphans; their basic needs; and, their educational needs. What can be said about the self-esteem of orphans;
4. establish the educational provision for, and experiences of, orphans;
5. understand to what extent these situations and understandings are gendered;
6. attempt to influence the policies of ministries and agencies in Malawi and in aid-donor countries.

¹ The UK Department for International Development [DFID] supports policies, programmes and projects to promote international development. DFID provided funds for this study as part of that objective but the views and opinions expressed are those of the author alone.

Methods

The study developed into a multi-site case study in which the central task was primarily to "thoroughly understand" [see Stake, 1995 p 9] the perceptions of orphans. We prioritised the understanding of complexity over generalisation and generalisation is treated as naturalistic or soft and not all inclusive [see Stake, 1995, p 85]. This approach was designed to accord with the existing policy and support which endeavours to embrace the complexity of community based organisations and to respond sensitively to local need.

First steps were to establish the whereabouts of orphans in the Zomba area. In 1991 the Malawian government created the National Orphan Care Task Force [see UNAIDS, 2000 p 28] which has fostered the development of registered Orphan Care Groups [OCGs] at community level. OCGs are voluntary organisations that seek to provide pre-school education, food, financial, counselling and subsistence support, carers groups, women's groups and vocational education. OCGs are not orphanages, some of which are beginning to be developed by out of Malawi charity groups. Orphanages are criticised for taking children out of the community care system but may be useful where community care is overwhelmed or ineffective. OCGs are served by District Social Welfare Officers [there are between 26 and 29 Districts in Malawi, depending on the information source] who are grouped into three administrative regions. All are administered by the Ministry of Gender, Youth and Community Services.

The Social Welfare Officer in Zomba is Stephen Phiri. He was asked to provide letters of introduction to eight OCGs in Zomba and within a radius of thirty kilometres of the town [this took us near to the limits of the District]. He was asked to select OCGs that had coordinators who would be open to visits and to discussing their work. These are cases and not samples [see Stenhouse 1980/87]. The use of cases, as opposed to samples, implies that the validity of our conclusions is not dependent upon selecting sizeable numbers of respondents [see Parlett and Hamilton, 1972/1987; Lather, 1993; Janesick, 1994; McBride, 2001]. Rather, we sought to work in-depth.

One week was spent visiting villages and OCGs introducing ourselves², outlining the nature of the study and the ethical framework to orphans, carers and OCG coordinators. Other visits were for data gathering in the forms of interviews and re-interviews [recorded by audio tape or written notes as appropriate], observations and collection of documents. Some use was made of photographs to record the data gathering context and to provide a visual record of orphans, their living conditions and other OCG activities, such as the distribution of food. [For a detailed timetable of activities see Appendix 1 and Appendix 2 contains a photograph of the genre used].

We interviewed in-depth [up to three times each], thirty five orphans; twenty five carers; eight OCG coordinators. Interviews were recorded by notes and/or audio-tape and varied in structure from open-ended to semi-structured to tightly structured depending upon the respondent and the data required. To go beyond this initial respondent set we used theoretical sampling [see Strauss and Corbin, 1990] by taking additional respondents and testing our emerging theories. We also tested our theories with OCG co-ordinators, the Social Welfare Office in Zomba and, perhaps most significantly with people active in the field at the Lilongwe conference [from NGOs, agencies and ministries]. It should be borne in mind that the eight OCGs cover some one hundred and seventy villages; the District Social Welfare Officer works with thirty OCGs and those present at the Lilongwe conference [see Appendix 3] cover parts of the whole country and other countries. The Zomba conference [see Appendix 4] was very much concerned with asking the attendees to consider the validity of our preliminary report which was circulated in both English and Chichewa.

² Dr McBride was the senior researcher. He worked with Martin Gulule and, to a lesser extent, Amos Chauma, both of the School of Education, Chancellor College, University of Malawi, Zomba

Data from orphans and their carers was gathered in village settings. On the advice of the District Social Welfare Officer we began by clearly stating that we were not going to pay anybody any money. We explained that we considered that our task was to understand and then to tell the stories of orphans to people outside. We were information carriers. On this basis nobody refused to be interviewed, indeed many thought that it was extremely important that their voices were heard in Malawi and beyond [see below].

The use of life histories was adopted for a number of reasons. They are:

- this method has long been used to give "voice to people long denied access" [see Smith, 1994 p 288 and also Holland et al, 1998];
- we believed it would enable ordinary people to talk about their own views at a time of the mass trauma of HIV/AIDS;
- we anticipated that respondents especially older carers, would be able to reflect upon their own circumstances and reveal their inner thoughts;
- it was hoped that it would be a useful device that would facilitate verbal interviews.

In the event our use of life histories was only partially useful. Many of the older people we spoke to were very keen to, and could see significant reasons for, relating their experiences with orphans. Interviewing young children is not easy and it soon became readily apparent that older orphans [those aged 13 or above] were better sources of data. We could explore the lives of younger orphans by asking the older ones to reflect upon their younger years. Nevertheless we persevered in talking to the younger ones and did acquire useable data. Three became, understandably, upset at discussing the circumstances of the deaths of their parents and interviews were terminated or resumed later if the child agreed [not all did]. We believe that essential to the gathering of quality data from children is close familiarity, extended periods of time and, opportunistic and imaginative methods. This three month project did not allow always us this possibility.

Mr Gulule and Dr McBride spent a great deal of their time speaking with females [especially carers] and engaged in negotiations with two women academics from Chancellor College. In both cases it was impossible to use either of the women in this research although both agreed. A central problem was that this project was not able to match the payments available to them for non-research consultancies offered by large governmental agencies. As an aside this is having a very negative effect on the academic expertise available in Malawi [and elsewhere in sub-Saharan Africa, see McBride, 2001 forthcoming and Samoff, 1999]. An appropriate female was found but only at the end of the project when it was too late to engage her other than as an observer.

Part of Mr Gulule's work was to conduct a reflexive study within the study. We two researchers had frequent meetings to consider and debate a day's or a week's work but this was taken further. We sought to understand how these poor and little travelled villagers responded to a white man [an Mzungu in Chichewa, the local language] visiting their homes and asking questions. How did they answer? What did they expect? Did they tell the truth? Did they say what he expected to hear? And so on. Respondents in general referred to the importance of their experiences being shown to others. They felt they were ignored and, therefore, were particularly keen that records in the forms of notes, audio-tapes and pictures were made. They felt the interviewing process was a release and many suggested that the interviewers were friendly and open. Indeed, most felt happier about talking to a Mzungu, some because they expected something in return even though they had been told this would not happen. On the whole Mr Gulule concluded that the information gathered was fair, accurate and relevant though many respondents felt they would have liked more time to have given more detail.

Making sense of the data took place partly at UEA with the support of colleagues and students [two seminars took place] but also in Malawi where Martin Gulule worked semi-independently. Central to the technique was the to and fro of debate with colleagues and respondents whenever possible. As part of this technique the researchers acted as 'information-brokers' [see MacDonald, 1974/1987], testing the ideas and views of

interviewees and discussants with others. Gradually, issues were separated and placed into categories and then related theoretically [see Strauss and Corbin, 1990 p 254]. The theories were then tested with respondents and at the two conferences. In this way we tried to ensure that the outcomes were grounded [Strauss and Corbin, op. cit p 254-7] in the lives of orphans and villagers but also that we understood the responses at the Lilongwe conference.

There is broad agreement amongst orphans, carers and OCG coordinators about the major issues that are reported below in the findings. Speakers at the Lilongwe conference confirmed our view that little and patchy support is being offered at village level in the area of orphan care but there is a wish to do much more. We believe [see below] that the Lilongwe conference will not only be significant in supporting the development of policy but that those developments, because of the grounded nature of this research, will have a practical intent [see below]. Finally, we have endeavoured to, and will continue to endeavour to, write in ways that potential readers find readable [we have some documents in Chichewa, for example] and useful.

Findings [in relation to objectives 1 - 6, above]

1. give an account of what constitutes orphanhood

There are various definitions of what an orphan is. UNAIDS say an orphan is a child who has lost a mother [this is significant in Malawi where women are almost always the carers] or both parents [UNAIDS, 2001]. In another publication UNAIDS adds that the child should be aged 15 or less [UNAIDS 2000]. We have come across other definitions where the age of 18 is seen as significant. In Malawi the government works with the [Malawian] legal definition that an orphan is "A child who has lost one or both parents because of death and is under the age of 18 years." [Ministry of Gender Youth and Community Services/UNICEF, 1999 p 1].

We have a thorough understanding of how orphans became orphans and of how they are cared for. Indeed, it would be possible to stereotype orphans in terms of circumstances that led to orphanhood [e.g. forms of death, age when orphaned etc]; types of orphanhood [e.g. are there grandparents, is there a surviving parent etc]; and by categories of care arrangements [e.g. are siblings dispersed, what treatment do they receive etc]. While these have added to our understanding our experience is that orphans respond to these circumstances in different ways according to their own personality and perceptions. If we were to relate these findings to policy we would point out that where parents are ill for an extended period before death, the children face the same problems as orphans, if not worse. Second many of the grandmothers who are having to look after their grandchildren as orphans, often have enormous problems in providing food and guidance. Third, there are many vulnerable children in Malawi whose lives and circumstances are barely distinguishable from orphans.

2. investigate the lives of orphans in an area of Malawi

Almost all of the orphans we spoke to complained of shortages of food, clothing, soap and bedding. This was corroborated by care group co-ordinators, carers and through our own observations. These problems are rooted in their poverty and provide a rich seed bed for a host of other problems. [see comments on female poverty below].

Few orphans eat as many as two poor meals a day, have few clothes, no bedding and no soap. Hungry, poorly clothed children do not go to school or if they go they do not stay [headteachers have confirmed this]. Without at least standard eight, the end of primary schooling, and a reasonable command of English, job prospects in Zomba are low. In this way the orphans remain poor, many stay in the villages. Bored, they become involve in casual sexual relationships. Orphans give birth to orphans. Those who are HIV positive give birth to those who are susceptible to HIV.

Many of the orphans, the families who care for them and the OCGs, feel forgotten by the rest of [Malawian] society. One indication [we have stronger evidence] of this occurred when we asked a group of orphans and guardians if we could visit their homes on our next visit. To our surprise there was spontaneous and prolonged applause. As other matters

arose we were unable to ask for an explanation. At another meeting we made a similar statement, again it was followed by enthusiastic clapping. This time we asked why. The response was clear. "If you visit us then you will see the problems." And "Nobody comes here to see how we live. Even [a named INGO] stops at the tarmac and asks us questions there." Indeed, we could find very little evidence of external support for the care groups, though there was some.

Some elements of community provision [through OCGs] seem to work well, e.g. care - nearly all of the orphans are taken in by 'guardians'; networks are strong and when people are particularly needy, if there are spare resources, they are distributed; OCG co-ordinators, usually local businessmen, put in great efforts to bring in support, discuss activities and so on. Other elements do not work as well, e.g. fund-raising is variable between care groups; pre-school and vocational teachers are not always well qualified and their time is restricted. There is a need for a major discussion about what should be provided locally through OCGs and what, e.g. vocational training and pre-schooling, should be provided through other institutions.

3. establish the life histories of orphans; their basic needs; and, their educational needs. What can be said about the self-esteem of orphans

[Basic needs are referred to as part of 2, above]

It should be stressed that there is a need for a concerted push into vocational education, at a time when most large funders are encouraging investment in basic education. If orphan care groups are to provide vocational training more effectively there is a need for equipment [e.g. sewing machines, carpentry and tinsmithing tools] and secure buildings to store them. Pre-school playgroups are considered valuable for orphaned and other children and their parents/carers but there is a major shortage of toys and other equipment.

One school in particular has suggested that it would like to provide each child [all children] with a porridge breakfast every day and a snack at break time. The Care groups say that preschool children and even those engaged in vocational training stay between 8 am and 4 pm without food. They would like to be able to do the same. The school was asked to plan and budget for such a scheme. It provided a detailed budget estimating that it would cost under kw 400 per annum per pupil [approx £3.50, less than two pence per meal]. This would provide some food and encourage pupils and students to attend regularly. The school would also like to provide a bar of soap to every child who attended for a full week.

A number of schools we have spoken to see the need for increased pastoral support, including feeding but also for counselling. Indeed the school seems the best place to provide such psycho-social support and efforts should be made to develop schooling that goes beyond delivery of knowledge. A teacher training college consulted has accepted this as a significant point and perceives that these thoughts open up the whole area of teaching and learning within schools. We have concluded that in the same way that all educational issues should be gendered, they cannot be properly understood now in countries like Malawi without being 'HIVed'.

Unlike primary schooling, secondary schooling is not free and we met many orphans who had the qualifications to go to secondary school but could not afford fees, uniforms or books. Without a secondary education, employment hopes are weak.

One NGO has provided funding to OCGs for a revolving fund [loans are repaid with interest and this is then loaned to a new person]. This seems to have worked well in some of the care groups but the money available is far below what is needed and more training on how best to use and account for the money was needed. Currently most people eligible for loans through this route are carers but some OCGs are beginning to consider the older orphans.

Schools reported that most orphans did not remain at school through the sessions [terms]. Attendance is erratic, partly because of lack of breakfast and soap, and many orphaned pupils 'did not feel at ease with themselves'. As they fall behind there is less incentive to return to school.

We have concluded, on the evidence collected, that cycles of deprivation dominate peoples' lives [see below]. Without opportunities for better quality pre-school education, training, especially technical and vocational training, and perhaps start up funding and knowledge of business management, we, and the Malawians we have spoken to, believe that these cycles will continue. The level at which people are living seems to place them below a threshold where they can help themselves beyond a hand to mouth existence and a diminishing life expectancy.

4. establish the educational provision for, and experiences of, orphans

In general there is no specialist provision for orphans in schools but all schools we visited saw the need and, with support, are prepared to adapt.

Primary schooling in Malawi is free but some schools insist on school uniform. Orphans cannot afford school uniform and are sometimes sent from school. As we have said orphans are already discouraged from attending school because they are hungry or because they cannot afford soap to wash or because their clothes are shabby [and much worse]. Villagers feel very strongly that it is essential to keep orphans in schools.

We encountered some cases where orphans were teased by their peers, sometimes because they were orphans but more often because they could not afford reasonable clothing or had no soap to wash [the villages are very dusty and this clings visibly to the skin].

5. understand to what extent these situations and understandings are gendered

Women are, overwhelmingly, the main carers of orphans and female orphans, as child-bearers, have greater personal burdens and more constraints on their personal development than men. We found no evidence of sexual abuse of orphans, possibly because this would take a longer and more intensive study to uncover. We did find a number of female orphans who, having been invited into a carers family, were treated as household servants - this was especially true where children had been orphaned at a young age and seemed to have different expectations, never having been part of their own families.

A critical general issue is the poverty of females in relation to males, which has enormous ramifications for their child bearing, for aids and for orphanhood. We have spent considerable time mapping the decisions that women [as orphans, carers, widows, grandmothers] have made and see their poverty in relation to men as at the hub of cycles of poverty, orphanhood and aids. Education in terms of skills development, training to run their own business and gender awareness [early marriage and pregnancy can be survival strategies] may help break these cycles - this is not only the view of these researchers but also the overwhelming view of the women themselves.

6. attempt to influence the policies of ministries and agencies in Malawi and in aid-donor countries [see also Dissemination, below]

The field of orphan care is complex with a range of government, NGO and other activities. We were told by a senior civil servant in Malawi that, in a sense, orphan care is 'beyond policy' because so many ministries, agencies and NGOs have a legitimate interest. There is a case for a measure of co-ordination at the centre though not, in the view of OCGs, at the expense of periphery and local action.

Efforts to coordinate all government and donor activity in HIV/AIDS are being made through the National Aids Coordinating Programme working with UNAIDS. Together they have formed the Technical Working Group [with other significant organisations] and developed a number of thematic sub-groups, one of which is concerned with orphans and widows. Several of those present at the Lilongwe conference are members of this sub-group and they decided at the conference that what emerged from the day, in the form of an issues list and our preliminary report, would form the basis for discussion at the first meeting and provide agenda items for the coming months. [We feel very pleased that we have been able to support policy development with so small a study].

Currently, in the Malawian parliament there is a bill that will be law, we are told, by April 2001, that will regulate and guide provision for orphans and vulnerable children, making no distinction between the two. Again our research reports will feed into this process.

Dissemination

As outlined in the original proposal, two day conferences were held - one in Lilongwe for members of agencies and ministries [see appendix 3 for the programme and the attendance] and one in Zomba [see appendix 4 for the programme and the attendance] for local participants. Both were lively meetings that were as much part of the research process as of dissemination. Most of the major NGOs and ministries working in the field of orphan care attended in Lilongwe and forty locals were at the Zomba meeting.

Dissemination at UEA has already been mentioned and is ongoing and Dr McBride is currently writing two papers. One is already commissioned and referred to in the original proposal, i.e. The Education and Lives of Orphans in Malawi [working title], in Yeakey C.C, Reed T.A, and Richardson J.W. "Suffer the Little Children:" National and International Dimensions of Child Poverty and Policy. Oxford, Elsevier. A second paper, The Educational Needs of Orphans in Malawi [working title] is to be given at the Annual Conference of the Centre for African Studies [Africa's Young Majority: Meanings, Victims, Actors], University of Edinburgh in May and will subsequently be prepared for publication. A third paper which focuses on so-called 'Mzungu research' has been requested for submission by the Malawian Journal of Educational Development [an internationally refereed journal] and a fourth paper, which will consider the lives of grandmothers as carers of orphans will follow. A journal for publication will be sought. [see Appendix 5 for abstracts of proposed papers].

All reports will be disseminated as widely as possible, including to those who participated.

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Appendix 1 Dr McBride's Timetable

January 2nd - 5th Preparation;

January 8th Departure for Malawi;

January 9th Arrival in Malawi and meeting with Martin Gulule;

January 10th - 13th Zomba District Welfare Office and 1st Visits to OCGs [Jan 12th - Visit to Ministries of Education and Gender, Youth and Community Services, and to National Aids Coordinating Programme Office, Lilongwe];

January 15th - 20th 2nd visits to OCGs and project planning meetings. Telephone links made to INGOs in Lilongwe - Action Aid; DFID; Save the Children [UK]; Save the Children [US]; UNAIDS; UNICEF; World Vision;

January 22nd - 25th 3rd visits to OCGs;

January 26th Return to UK;

February was spent at UEA transcribing tapes, making sense of data, theorising, preparing documents, making contact with London offices on INGOs. A visit was made to the Centre for International Education at Sussex University to disseminate and to discuss Malawi with Dr Janet Stuart and Dr Fiona Leach. On Tuesday 20th February a lunchtime seminar was held in the School of Development Studies to discuss the project, preliminary theorising and future progressive focussing of the project. On 23rd February I addressed some forty MA students of Education for Development and Social Development on this project.

In February in Malawi Martin Gulule was conducting a small reflexive study within the study;

March 5th - Return to Malawi;

March 6th - 10th 4th visits to OCGs;

March 11th Depart to Lilongwe

March 12th Visits to INGO offices, ministries and to DFID and to conference venue, Lilongwe. Return to Zomba in the late evening;

March 13th - 17th 5th visits to OCGS, Divisional and District Education Offices and preparation for the two dissemination conferences;

March 17th Depart for Lilongwe;

March 19th Day conference in Lilongwe. Return to Zomba in the late evening;

March 20th Further preparation for Zomba conference; meetings with staff at Chancellor College and with Divisional Education Manager;

March 21st Zomba Day Conference;

March 22nd Final meetings with staff from Chancellor College, including Martin Gulule;

March 23rd Departure for UK;

March 26th - 30th Data processing, theorising, preparation of final report and beginning preparation of papers for publication;

Appendix 2

Appendix 3

UNDERSTANDING THE EDUCATIONAL NEEDS OF ORPHANS IN MALAWI - LILONGWE DAY CONFERENCE

You and up to two colleagues are invited to attend a day conference to discuss the above. Dr Rob McBride [University of East Anglia, UK] and Martin Gulule [Chancellor College, Malawi] have been researching this topic for the past three months. This is an opportunity for them to listen to the agencies active in this field; for the agencies to comment on the outcomes of their research; and for all the participants to interact.

THE CONFERENCE WILL TAKE PLACE AT KUKA LODGE [AREA 43] FROM 10 AM TO 3 PM
ON MONDAY 19TH MARCH

THE DAY [times are approximate]

09.45 Tea/coffee;

10.00 Keynote Penstone Kilembe, Director of Social Welfare, Ministry of Gender, Youth and Community Services;

10.10 - 12.00 Each Group [see below] will have ten minutes to outline their interests in, and experiences of, the educational needs of orphans [in bullet point format]

12.00 - 12.30 A list of what we consider to be the significant issues will be drawn up;

12.30 - 13.15 A light lunch and fruit will be provided;

13.15 - 14.30 Discussion of the significant issues;

14.30 - 15.00 Plenary. [To include a summary of the afternoon's discussion and any plans for the future. Rob and Martin would welcome comments on whether they should seek to continue with their work as information providers].

PARTICIPANTS [in alphabetical order, names subject to change]

ActionAid [Lawrence Khonyonga and colleagues]; DFID [Keith Gristock and Christopher Cosgrove hope to attend]; Ministry for Gender, Youth and Community Services [Penstone Kilembe and Leston Muhango]; Ministry of Education [to be announced]; Save the Children [UK] [Andrea Ledward and colleague]; Save the Children [US] [Chifundu Cachiza and colleague]; UNAIDS [Angela Trenton-Mbonde and colleague]; UNICEF [two participants to be announced]; World Vision [Mr Moyo]. In addition the Ministry for Gender, Youth and Community Affairs will invite a representative from a CBO [Mr Mpande], and a religious organisation active in the field.

Rob McBride. 13.3.2001.

Appendix 4

UNDERSTANDING THE EDUCATIONAL NEEDS OF ORPHANS IN MALAWI - ZOMBA DAY CONFERENCE

You and up to four colleagues are invited to attend a day conference to discuss the above. Dr Rob McBride [University of East Anglia, UK] and Martin Gulule [Chancellor College, Malawi] have been researching this topic for the past three months. This meeting is for them to report on their research and for people in the field, especially orphan care groups, to comment and criticise. This will contribute to the research process. Please note that the conference will take place at the **Gymkhana Club in Zomba**.

THE CONFERENCE WILL TAKE PLACE AT THE GYMKHANA CLUB, ZOMBA FROM 10 AM TO 3 PM ON WEDNESDAY 21st MARCH

THE DAY [this agenda can be changed, if the group wishes]

09.45 Tea/coffee;

10.00 - 10.15 Keynote Speech, Dr Fred Msiska, Dean of the School of Education, Chancellor College;

10.15 - 10.45 Rob and Martin will outline what they have discovered in their research

10.45 - 12.00 We will split into groups to talk about two matters [please speak in Chichewa, if you prefer]:

1. Describing our orphan care group [please be ready to talk about your group from your own point of view]

2. What has the research missed?

12.00 - 12.30 The educators and social welfare officers will be asked to talk about how they can prepare teachers, schools and their service to help orphans. If changes are not possible it would be helpful for us to know the constraints;

12.30 - 13.30 Lunch will be served;

13.30 - 14.30 What have we learned and where do we go to from here;

14.30 - 15.00 Plenary. [To include a summary of the afternoon's discussion and any plans for the future. Rob and Martin would welcome comments on whether they should seek to continue with their work as information providers].

PARTICIPANTS [in alphabetical order]

Chiwirizano Orphan Care Group [Mr Thomas Mafolo]

Chikanda Orphan Care Group [Richard Kasenda]

Chilimba Women's and Orphans' Care Group [Mr and Mrs Mtima]

Mtiya Orphan Care Group [Mrs C. Mpesi]

Namadidi Orphan Care Group [Mr Mitungwi]

Namilongo Orphan Care Group [Mr Gama]

Songani Community Care Group [Mr Mpoya]

Village to Village Orphan Care Group, Domasi [Mr Mandalawe]

We also expect two headteachers [Mr Kuntanga from Namilongo Primary School and Mr Kalaundi from Mataya Primary School, Chikanda]; Mrs Chamasowa District Education Officer, Zomba [urban]; lecturers from Blantyre Teachers' Training College and Chancellor's College, Zomba; and Stephen Phiri of the Social Welfare Office, Zomba.

Appendix 5 - Abstracts of Proposed Papers

For Yeakey C.C, Reed T.A, and Richardson J.W. "Suffer the Little Children:" National and International Dimensions of Child Poverty and Policy. Oxford, Elsevier.

Working Title: Education, Orphans and Their Female Carers in Malawi

Author: Rob McBride

The spread of AIDS in sub-Saharan Africa has been so virulent that fundamental societal processes are threatened. For example, in Malawi each year the loss of teachers now exceeds its output of qualified teachers. Malawi is one of the worst affected countries by AIDS and those who suffer most are, as is often the case, those with the least wealth and power. There are very large numbers of children who have lost one or both parents to AIDS related disease, young females carry a greater burden.

This paper emerges from research carried out in Malawi. Educational policy theorists have long acknowledged that policy, and its interpretation and effects, have a tendency to diverge. Policy is often conceived as a set of all embracing ideas that are created by a group that sits in a ministry and is then implemented by passive agents. This paper will explore how AIDS education policy in Malawi relates to the lives and experiences of orphan children - how and why the activities of the government and its agencies influence their education and lives.

In late 1999 the government of Malawi, in association with major funders such as the World Bank, set up a National HIV/AIDS Strategic Framework and a National AIDS Control Programme. The task was to operate at local and community levels to find out how the spread of AIDS takes place and how it might be curtailed. The notion that policy might be dominated by a framework but have an encouraged local element is relatively unusual, especially in Africa, and will be of interest in itself. This paper will certainly describe policy but more significant will be its portrayal of the children who are the subject of the policy.

The dominant research task will be to get close to the orphans, to portray their critical life events, the contexts of their lives and the decisions they have made. To this end a 'life histories' approach will be used and in the text the researcher will seek to give those children a 'voice' in the paper by providing some individual portrayals. Preliminary research suggests that some children are adopted by relatives; some are adopted by teachers; others are left to roam and survive as best they can. Even where their basic needs are provided by adopters the children have emotional difficulties arising from the loss of parents; they are sometimes stigmatised by other students; and many have no idea whether they are HIV positive but fear the worst. Orphaned young women, when they are very poor and little cared for, often have little control over their sexual partners and can be drawn into an AIDS proliferation cycle. The earliest approaches to AIDS education in Malawi hovered around a religious message of abstention from sexual intercourse but, to the author's knowledge there is no support for orphans nor any serious understanding of their personal or educational needs. Many drop out from school.

At the very least this contribution will provide the sort of close-to-people perceptions that policy makers need to develop effective policy. It will also comment on the policy/practice dynamic in Malawi. Above all it will draw attention to the lived experiences of children, who are indeed suffering, and indicate how policy could develop to enable them to thrive.

For the Annual Conference of the Centre for African Studies [Africa's Young Majority: Meanings, Victims, Actors], University of Edinburgh May 23/24.

Working Title: Young Victims of HIV/AIDS. Cycles of Deprivation, Orphanhood and HIV in Malawi.

Author: Rob McBride

With HIV/AIDS Malawi has experienced an enormous growth in orphans [children of 18 and below who have lost one or both parents]. This paper reports on a research project that investigated the lives and times of orphans in and around the former capital, Zomba. We found orphans living in abject poverty or just above with little clothing, no bedding, no soap and little to eat. Valiant efforts are being made through a national system of community based Orphan Care Groups but we kept seeing poor people bringing up poor children. Orphans giving birth to orphans and those with HIV giving birth to children who will be susceptible to HIV. No-one asked for charity but there is a widespread view that with a little help they could help themselves. The people are their own best resource but they need education and training. These are the stories of the orphans, their carers and what could be ways forward for them.

For submission to the Malawian Journal of Educational Development.

Working Title: Doing Mzungu Research in Malawi

Authors: Martin Gulule and Rob McBride

The authors have been conducting research into the educational needs of orphans in Malawi. Adhering to a policy of 'putting the last first', the research has taken primarily in villages around the former capital of Zomba. While McBride has been the senior researcher Gulule, a Malawian, has been responsible for carrying out a reflexive element of the research. He has met with many of those who have been part of the research and sought to clarify the perceptions of Mzungu researcher, McBride. He sought to understand how these poor and little travelled villagers responded to a white man visiting their homes and asking questions. How did they answer? What did they expect? Did they tell the truth? Did they say what he expected to hear? And so on.

This paper considers the answers to these questions and places the interest in the questions against a background of research questions associated with reflexivity, the politics and ethics of research, cross-culturalarity, methods and methodology.

For submission to an Unnamed Journal.

Working Title: Grandmothers as Orphan Carers in Malawi

Author: Rob McBride

Many women of fifty and over were most sexually active prior to the onset of the HIV/AIDS epidemic. They lived at a time when sex more often took place within the family and when women may have six or eight children. In the villages around Zomba in Malawi there are many such women who have seen their children, or most of them, succumb to HIV/AIDS leaving their children to be brought up by the matriarch. Some grandmothers have eight or more dependants and no means of feeding them other than with the food they can grow in their small plots. Moreover, how do they advise and counsel teenagers as they grow up. This paper tells the stories of these older women, reaching the ends of their lives, who carry great burdens.

HIGHLIGHTS SUMMARY OF UNDERSTANDING THE EDUCATIONAL NEEDS OF ORPHANS IN MALAWI - Dr Rob McBride

This small project has sought to conduct in-depth research into the lives of orphans, their basic needs and the educational needs. Much of this has centred on building an understanding of the perceptions, decisions and actions of orphans and their carers and to elaborate their views of the constraints they face. Conclusions emerging from this fieldwork were triangulated with appropriate agencies and ministries and have already begun to influence policy development in Malawi.

Objectives

The study sought to:

1. give an account of what constitutes orphanhood;
2. investigate the lives of orphans in an area of Malawi;
3. establish the life histories of orphans; their basic needs; and, their educational needs. What can be said about the self-esteem of orphans;
4. establish the educational provision for, and experiences of, orphans;
5. understand to what extent these situations and understandings are gendered;
6. attempt to influence the policies of ministries and agencies in Malawi and in aid-donor countries.

Methods

The study developed into a multi-site case study in which the central task was primarily to "thoroughly understand" [see Stake, 1995 p 9] the perceptions of orphans. We prioritised the understanding of complexity over generalisation and generalisation is treated as naturalistic or soft and not all inclusive [see Stake, 1995, p 85]. This approach was designed to accord with the existing policy and support which endeavours to embrace the complexity of community based organisations and to respond sensitively to local need.

In 1991 the Malawian government created the National Orphan Care Task Force [see UNAIDS, 2000 p 28] which has fostered the development of registered Orphan Care Groups [OCGs] at community level. OCGs are voluntary organisations that seek to provide pre-school education, food, financial, counselling and subsistence support, carers groups, women's groups and vocational education. OCGs are not orphanages, some of which are beginning to be developed by out of Malawi charity groups. Orphanages are criticised for taking children out of the community care system but may be useful where community care is overwhelmed or ineffective. OCGs are served by District Social Welfare Officers [there are between 26 and 29 Districts in Malawi, depending on the information source] who are grouped into three administrative regions. All are administered by the Ministry of Gender, Youth and Community Services.

Outcomes in Brief [in relation to objectives 1 - 6, above]

1. give an account of what constitutes orphanhood

In Malawi, ministries with responsibility for orphans currently work with the legal definition that an orphan is "A child who has lost one or both parents because of death and is under the age of 18 years." [Ministry of Gender Youth and Community Services/UNICEF, 1999 p 1].

We have a thorough understanding of how orphans became orphans and of how they are cared for. Indeed, it would be possible to stereotype orphans in terms of circumstances that led to orphanhood [e.g. forms of death, age when orphaned etc]; types of orphanhood

[e.g. are there grandparents, is there a surviving parent etc]; and by categories of care arrangements [e.g. are siblings dispersed, what treatment do they receive etc]. While these have added to our understanding our experience is that orphans respond to these circumstances in different ways according to their own personality and perceptions. If we were to relate these findings to policy we would point out that where parents are ill for an extended period before death, the children face the same problems as orphans, if not worse. Second many of the grandmothers who are having to look after their grandchildren as orphans, often have enormous problems in providing food and guidance. Third, there are many vulnerable children in Malawi whose lives and circumstances are barely distinguishable from orphans.

2. investigate the lives of orphans in an area of Malawi

Almost all of the orphans we spoke to complained of shortages of food, clothing, soap and bedding. This was corroborated by care group co-ordinators, carers and through our own observations. These problems are rooted in their poverty and provide a rich seed bed for a host of other problems. [see comments on female poverty below].

Few orphans eat as many as two poor meals a day, have few clothes, no bedding and no soap. Hungry, poorly clothed children do not go to school or if they go they do not stay. Without at least standard eight, the end of primary schooling, and a reasonable command of English, job prospects in Zomba are low. In this way the orphans remain poor, many stay in the villages. Bored, they become involve in casual sexual relationships. Orphans give birth to orphans. Those who are HIV positive give birth to those who are susceptible to HIV. Many of the orphans, the families who care for them and the OCGs, feel forgotten by the rest of [Malawian] society. We found very little evidence of external support for the care groups, though there was some.

Some elements of community provision [through OCGs] seem to work well, e.g. care - nearly all of the orphans are taken in by 'guardians'; networks are strong and when people are particularly needy, if there are spare resources, they are distributed; OCG co-ordinators, usually local businessmen, put in great efforts to bring in support, discuss activities and so on. Other elements do not work as well, e.g. fund-raising is variable between care groups; pre-school and vocational teachers are not always well qualified and their time is restricted. There is a need for a major discussion about what should be provided locally through OCGs and what, e.g. vocational training and pre-schooling, should be provided through other institutions.

3. establish the life histories of orphans; their basic needs; and, their educational needs. What can be said about the self-esteem of orphans

[Basic needs are referred to as part of 2, above]

It should be stressed that there is a need for a concerted push into vocational education, at a time when most large funders are encouraging investment in basic education. If orphan care groups are to provide vocational training more effectively there is a need for equipment [e.g. sewing machines, carpentry and tinsmithing tools] and secure buildings to store them. Pre-school playgroups are considered valuable for orphaned and other children and their parents/carers but there is a major shortage of toys and other equipment.

One school in particular has suggested that it would like to provide each child [all children] with a porridge breakfast every day and a snack at break time. The Care groups say that preschool children and even those engaged in vocational training stay between 8 am and 4 pm without food. They would like to be able to do the same. The school was asked to plan and budget for such a scheme. It provided a detailed budget estimating that it would cost under kw 400 per annum per pupil [approx £3.50, less than two pence per meal]. This would provide some food and encourage pupils and students to attend regularly. The school would also like to provide a bar of soap to every child who attended for a full week.

A number of schools we have spoken to see the need for increased pastoral support, including feeding but also for counselling. Indeed the school seems the best place to provide such psycho-social support and efforts should be made to develop schooling that

goes beyond delivery of knowledge. This opens up the whole area of teaching and learning within schools. We have concluded more generally that in the same way that all educational issues should be gendered, they cannot be properly understood now in countries like Malawi without being 'HIVed'.

Unlike primary schooling, secondary schooling is not free and we met many orphans who had the qualifications to go to secondary school but could not afford fees, uniforms or books. Without a secondary education, employment hopes are weak.

One NGO has provided funding to OCGs for a revolving fund [loans are repaid with interest and this is then loaned to a new person]. This seems to have worked well in some of the care groups but the money available is far below what is needed and more training on how best to use and account for the money was needed. Currently most people eligible for loans through this route are carers but some OCGs are beginning to consider the older orphans.

Schools reported that most orphans did not remain at school through the sessions [terms]. Attendance is erratic, partly because of lack of breakfast and soap, and many orphaned pupils 'did not feel at ease with themselves'. As they fall behind there is less incentive to return to school.

We have concluded, on the evidence collected, that cycles of deprivation dominate peoples' lives [see below]. Without opportunities for better quality pre-school education, training, especially technical and vocational training, and perhaps start up funding and knowledge of business management, we, and the Malawians we have spoken to, believe that these cycles will continue. The level at which people are living seems to place them below a threshold where they can help themselves beyond a hand to mouth existence and a diminishing life expectancy.

4. establish the educational provision for, and experiences of, orphans

In general there is no specialist provision for orphans in schools but all schools we visited saw the need and, with support, are prepared to adapt.

Primary schooling in Malawi is free but some schools insist on school uniform. Orphans cannot afford school uniform and are sometimes sent from school. As we have said orphans are already discouraged from attending school because they are hungry or because they cannot afford soap to wash or because their clothes are shabby [and much worse]. Villagers feel very strongly that it is essential to keep orphans in schools.

We encountered some cases where orphans were teased by their peers, sometimes because they were orphans but more often because they could not afford reasonable clothing or had no soap to wash [the villages are very dusty and this clings visibly to the skin].

5. understand to what extent these situations and understandings are gendered

Women are, overwhelmingly, the main carers of orphans and female orphans, as child-bearers, have greater personal burdens and more constraints on their personal development than men. We found no evidence of sexual abuse of orphans, possibly because this would take a longer and more intensive study to uncover. We did find a number of female orphans who, having been invited into a carers family, were treated as household servants - this was especially true where children had been orphaned at a young age and seemed to have different expectations, never having been part of their own families.

A critical general issue is the poverty of females in relation to males, which has enormous ramifications for their child bearing, for aids and for orphanhood. We have spent considerable time mapping the decisions that women [as orphans, carers, widows, grandmothers] have made and see their poverty in relation to men as at the hub of cycles of poverty, orphanhood and aids. Education in terms of skills development, training to run their own business and gender awareness [early marriage and pregnancy can be survival strategies] may help break these cycles - this is not only the view of these researchers but also the overwhelming view of the women themselves.

6. attempt to influence the policies of ministries and agencies in Malawi and in aid-donor countries [see also Dissemination, below]

The field of orphan care is complex with a range of government, NGO and other activities. We were told by a senior civil servant in Malawi that, in a sense, orphan care is 'beyond policy' because so many ministries, agencies and NGOs have a legitimate interest. There is a case for a measure of co-ordination at the centre though not, in the view of OCGs, at the expense of periphery and local action.

Efforts to coordinate all government and donor activity in HIV/AIDS are being made through the National Aids Coordinating Programme working with UNAIDS. Together they have formed the Technical Working Group [with other significant organisations] and developed a number of thematic sub-groups, one of which is concerned with orphans and widows. Several of those present at the Lilongwe conference are members of this sub-group and they decided at the conference that what emerged from the day, in the form of an issues list and our preliminary report, would form the basis for discussion at the first meeting and provide agenda items for the coming months. [We feel very pleased that we have been able to support policy development with so small a study].

Currently, in the Malawian parliament there is a bill that will be law, we are told, by April 2001, that will regulate and guide provision for orphans and vulnerable children, making no distinction between the two. Again our research reports will feed into this process.

Dissemination

As outlined in the original proposal, two day conferences were held - one in Lilongwe for members of agencies and ministries [see appendix 3 for the programme and the attendance] and one in Zomba [see appendix 4 for the programme and the attendance] for local participants. Both were lively meetings that were as much part of the research process as of dissemination. Most of the major NGOs and ministries working in the field of orphan care attended in Lilongwe and forty locals were at the Zomba meeting.

Dissemination at UEA has already been mentioned and is ongoing and Dr McBride is currently writing two papers. One is already commissioned and referred to in the original proposal, i.e. The Education and Lives of Orphans in Malawi [working title], in Yeakey C.C, Reed T.A, and Richardson J.W. "Suffer the Little Children:" National and International Dimensions of Child Poverty and Policy. Oxford, Elsevier. A second paper, The Educational Needs of Orphans in Malawi [working title] is to be given at the Annual Conference of the Centre for African Studies [Africa's Young Majority: Meanings, Victims, Actors], University of Edinburgh in May and will subsequently be prepared for publication. A third paper which focuses on so-called 'Mzungu research' has been requested for submission by the Malawian Journal of Educational Development [an internationally refereed journal] and a fourth paper, which will consider the lives of grandmothers as carers of orphans will follow. A journal for publication will be sought.

All reports will be disseminated as widely as possible, including to those who participated.

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