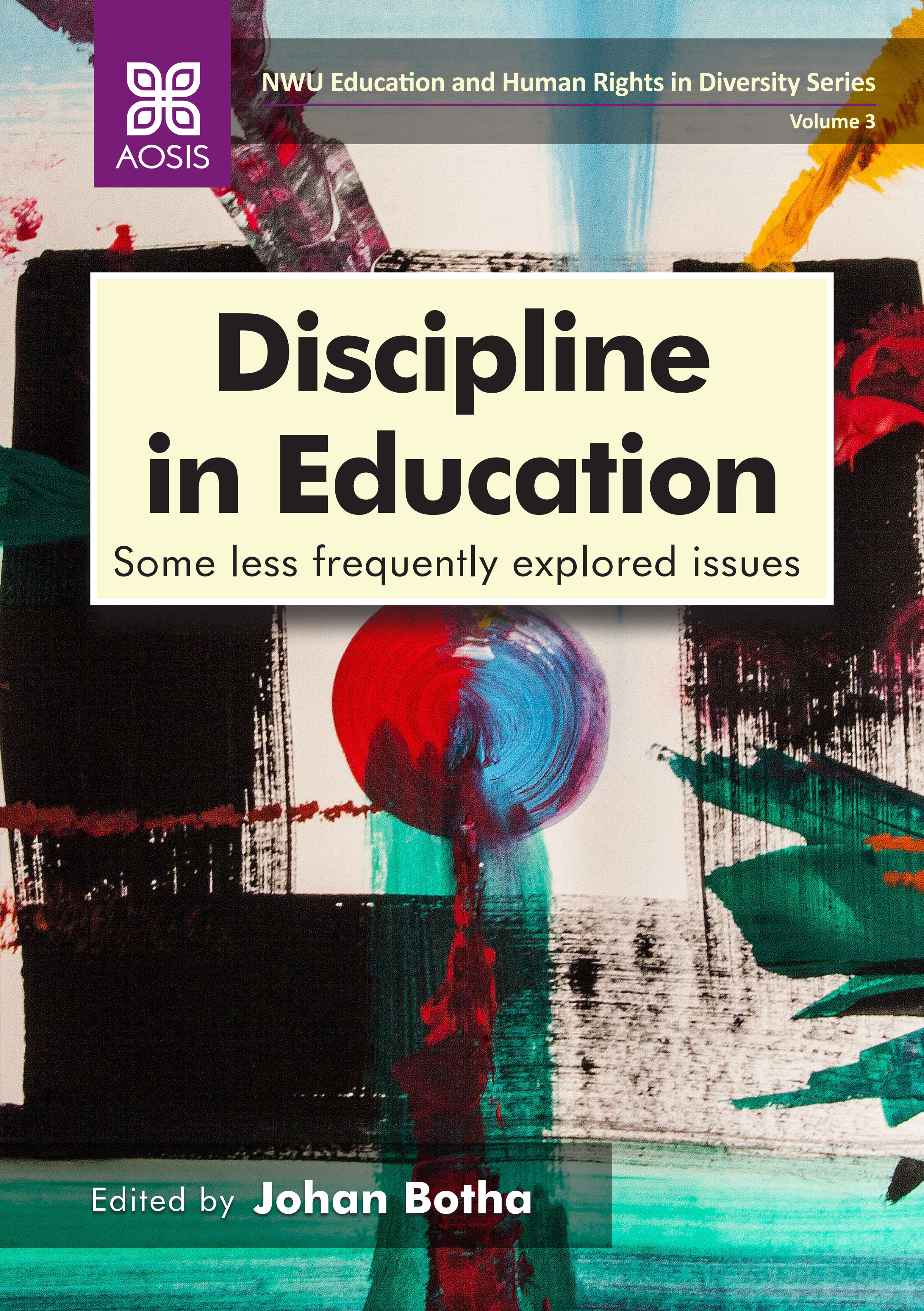

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Volume 3

Discipline in Education

Some less frequently explored issues

Edited by **Johan Botha**

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Volume 3

Discipline in Education

Some less frequently explored issues

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Research Justification

The current scholarly and public discourse on the issue of learner discipline in South Africa has focused on legislation and legal aspects relating to order and discipline in schools and other educational contexts. Existing research represents a reflection which is characterised by a preference to a behaviouristic point of view, and the categories used are typical of Western school systems – an approach that is deemed outmoded today. The main thesis of this scholarly book – with the title *Discipline in Education: Some less frequently explored issues* – addresses a perennial challenge in South African education, namely discipline. This focus shifts the current discourse into a new direction. The scientific contribution of this Edu-HRight Volume II lies in its purpose of opening up and deepening the discourse on discipline in the education context. It specifically focuses on some less frequently explored issues and thereby creates greater relevancy to the present South African context and the 21st-century socio-political environment.

The research results in this book are original and innovative. For the first time, the scholarly investigation into the issue of learner discipline in South African schools draws on indigenous knowledge systems, invokes postcolonial and decolonial perspectives, and offers an ethical and moral compass for behaviour that could contribute to the well-being of societies afflicted by unruly and antisocial behaviour. This book highlights numerous controversies about the discipline and associated issues and gives rise to future discussions on discipline and indiscipline in an epoch in which South Africa and many other societies are still struggling with the lingering effects of social and political transformation.

This book is a scholarly discourse written by various scholars for academic scholars, professionals and researchers. The range of disciplines practised by the contributors to this book is extraordinary. The authors include philosophers; moralists; corporativists; education law specialists; curriculum specialists; specialists in education and culture, including *Ubuntu*, aiming at immersing themselves in the new idea of postcolonialism; people exploring the impact of indigenous knowledge; people exploring agency; people explaining dysfunctionality and underperformance of schools; socio-educationists; theoreticians and people using a metasynthesis approach and practices, and religious practices such as an ethical and moral approach to parental and school discipline. This allowed for an intriguing depiction of opposing views on different discipline matters. This publication contains original research. The methodologies and approaches followed include epistemological aspects such as metasynthesis, linguistic etymology, hermeneutic phenomenology, comparative analysis, interpretivism, constructivism, literature survey, grounded theory, meta-analysis, autoethnography, methods of comparative education, document and biblical analysis. No part of this book was plagiarised from another publication or published elsewhere.

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Abbreviations, Figures and Tables Appearing in the Text and Notes

List of Abbreviations

ANA	Annual National Assessment
AZAPO	Azanian People's Organization
CHAT	Cultural-Historical Activity Theory
DBE	Department of Basic Education
ERIC	Education Resources Information Center
HoD	Head of Department
IEA	International Association for the Evaluation of Educational Achievement
ILSA	International Large Scale Assessment Data
IQMS	Integrated Quality Management System
LoLT	Language of Learning and Teaching
LRA	Labour Relations Act
NCV	National Certificate Vocational
NEPA	National Education Policy Act
NWU	North-West University
OECD	Organisation of Economic Cooperation and Development
PAM	Personnel Administrative Measures
PIE	Proto-Indo-European
PIRLS	Progress in Reading Literacy Study
PISA	Programme for International Student Assessment
PTL	Parent-Teacher-Learner
ROE	Research Outside Entities
RSA	Republic of South Africa

SAAD	South Africans of African Descent
SACE	South African Council for Educators
SADTU	South African Democratic Teachers' Union
SAELA	South African Education Law Association
SDL	Self-Directed Learning
SWPBIS	School-Wide Positive Behaviour Interventions and Supports
TIMSS	Trends in International Mathematics and Science Study
TRC	Truth and Reconciliation Commission
TVET	Technical and Vocational Education and Training
WBE	Work-based Exposure

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Chapter 1

A Christian ethical–moral approach to parental and school discipline

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Abstract

The recent increase in crime and violence and loss of social capital in countries such as South Africa has compelled educationists to examine and occasionally re-examine ways and means to address and rectify the problem. Although religious approaches to education in general, and parental and school discipline in particular, have lost credence in the current post-modern (and post-post-modern) age, they merit another look

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from educators and educationists. This chapter is devoted to a closer examination of disciplining – in the sense of discipling from a Christian-biblical perspective – young, less mature people at home and in school. The examination not only surfaces a number of biblical principles for education in general, and for discipline in particular, but also illustrates what educators who relinquish the Christian approach in favour of a secular-humanistic approach could expect. Like most forms of discipline inspired by a mainstream religious commitment, a Bible-oriented approach provides the educator with a firm footing in the process of disciplining and discipling the young. It provides the educator with an indispensable moral compass in the disciplining process.

■ Introduction

The issue of parental and school discipline could be approached from a variety of perspectives or vantage points. A discussion of discipline and the current state thereof could, for instance, commence with an exposition of the malaise from which a country such as South Africa (several other countries also come to mind, such as the Sudan and Venezuela) is currently suffering because of the absence of general discipline and the lack of social capital in society. I forego the temptation to do so because several of the other chapters in this book follow this route as an entrée to their respective discussions of discipline in general and of parental and school discipline in particular.[1] One could, as an alternative approach, fall back on the multitude of publications that have already appeared in

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[1] Like Van Wyk (2015), I prefer not to dwell too much on the incidence of violence and crime. However, it is hardly possible to overlook this problem in South Africa. More than 500 000 people were murdered in South Africa between 1994 and 2019. Someone is murdered every half-hour, at least 50 000 women are raped annually, 52 cars are hijacked each day, 120 000 vehicles are stolen annually and gangsterism is the order of the day in parts of the country to such an extent that the army had to be deployed in particular hotspots (cf. Van Wyk 2015:346).

Christian circles on the issue of order and discipline and just regurgitate what they have already shared in this regard (Cloud & Townsend 1992; Coetzee n.d.; De Muynck 2018; De Muynck, Vermeulen & Kunz 2017; Malan 1986; Postema 1997; Tripp 2005; Tripp & Tripp 2008).

Another possible approach to the problem of discipline in general, and to (in)discipline in parental homes and in schools, could be to begin the discussion with a conceptual analysis of the word or term ‘discipline’, which in essence embodies the notion of followership. Such an analysis would elicit a number of questions, such as who should be the leader and who the follower, whose example should be followed or emulated, and for what reasons should they follow this example? Whilst such an examination of the concept of ‘discipline’ could be fruitful in that it might yield important insights into the issue of discipline, it does not penetrate to the heart of the matter, to the ‘fixed and reasoned’ principle or principle(s) behind discipline, in this case, to which Peter Bazalgette (2017:24) alludes.

Another door to a discussion of the discipline problem in general, in parental homes and in schools, could be to enumerate the insights and perspectives that the Bible offers to educationists regarding discipline. Many of the verses in Proverbs come to mind here; a concordance would offer a plethora of biblical injunctions in this regard. I do not regard the latter approach as particularly helpful for understanding the ethical–moral dimension of discipline from a Christian or biblical perspective. Biblical quotes should first be hermeneutically and exegetically processed to arrive at coherent and meaningful insights about discipline. The same applies for a systematic discussion of the various ethical and/or moral approaches that could be followed, such as latitudinarianism, consequentialism or absolutism/determinism. Such terms only achieve meaning when discussed in the context of processed and coherent biblical perspectives, insights and principles regarding discipline in general and in educational or school contexts. I return to these issues after having set the scene for them.

In view of the argument above, I discuss discipline in general, in parental homes and in educational or school contexts in terms of a dual perspective, or more correctly, a double-sided perspective, namely ethical on the one hand, and moral on the other. Thompson (2018:3) correctly remarks as follows: ‘It may be useful to distinguish between “ethics” and “morality” – although in common usage the terms are almost interchangeable’. In Thompson’s book, generally speaking, *morality* refers to the rights and wrongs of a person’s conscious actions. Whereas Thompson sees ethics as ‘moral philosophy’ that covers the general principles by which we understand moral questions, the values by which we live, how people should treat one another, their obligations, rights and duties, and the good life, I see the term ‘ethical’ in this chapter to refer to adherence to a set of rules or values *imposed from outside* of the particular person, such as a code of ethics imposed on a teacher by his or her professional council. The teacher is compelled to obey these externally imposed ‘rules’ because contravention of them could lead to suspension from the teaching profession. In this particular case, the person (teacher) compelled to obey the rules need not necessarily agree with them but must obey them to prevent censure and sanctioning by the recognised authority in the field. The same applies to a school learner who must obey the school’s rules and code of conduct. Another example of a code of ethics that is externally imposed on the individual or group is the *Manifesto on Human Rights* that is encapsulated in the Constitution of the Republic of South Africa (RSA 1996). Although we as South Africans might not agree with each and every stipulation in this *Manifesto* (ch. 2 of the Constitution), we are compelled to adhere to all of them because we could be prosecuted for transgressing them. In the past years, we have had examples of what could happen if we do not adhere to the stipulations. Two ladies who used the ‘k-word’ with reference to black people were heavily punished in terms of prison sentences, and two gentlemen who confessed that they had used the same word had to pay heavy financial penalties. A well-known South African rugby player has also been prosecuted by the South African Human Rights Commission for allegedly having used the ‘h-word’ with reference to a person of mixed race. Thompson (2018:162, 168, 192) correctly observes that people who live together need rules, or at least general guidelines, to make their common life easier, and individuals need to take them into account when deciding what they should do. In a sense, ethical rules flow from a social contract, an agreement made between people who abide by certain rules, which limit what they are able to do, in order to benefit society as a whole and to allow everyone a measure of freedom and security. In an ideal world, Thompson claims, every social contract would allow the personal development of each individual.

Children in the parental home and at school must adhere to the rules and stipulations set by their parents, their teachers, the school governing body and other authorities, even if they do not (yet) understand why they should obey them, or what the reasoning behind them might be. Some children even find themselves confronted by statements such as the following from a parent when they challenge a particular order, command or stipulation: ‘You have to do so because I say so’, or ‘You have to do so because I know better’, or ‘You have to do so because I am the grownup here’, or ‘You have to obey because I am more experienced’ or ‘You have to do so because I am your parent and it is my duty to guide you in the right ways’.

It is clear from these examples that children occasionally have to deal with sets of ‘principles’ or ‘guidelines’ that are being imposed on them by external authorities and that they do not necessarily understand the rationale (the thinking, the reasons) behind the rules; they only understand that they might be censured or punished in cases of contravention or disobedience. This might be the case even when the authority that imposes the rule on the child is able to root the particular rule in a fair and reasoned principle. The principle might be ‘fair and reasonable’ according to the authority that imposes it, but it might not have the same status in the mind of an immature child. This is clearly one of the great tasks associated with the upbringing of children: to guide, help, nurture the young and immature to gain a deeper understanding of the principle underlying the rule and the reasons for censure and punishment. It stands to reason that the sooner the educator (parent or teacher) succeeds in bringing home to the child the rationale behind the rule and the reasons for punishment in cases of transgression of the rule, the better the child would understand the reasonableness (rationality) thereof and the greater the chances are of the child behaving in a disciplined manner. This issue, as I attempt to explain later, relates to the issue of the latitude of behaviour.

Following Grayling (2010:14–15), I see morality and moral behaviour as adherence to rules that come *from inside the person* responsible for the behaviour, rules and guidelines that the person has internalised, made his or her own as a set of principles according to which the person is voluntarily committed and prepared to act and live by. Morality, Grayling states, is ‘categorical as opposed to hypothetical’ (Grayling 2010:15): it is about intrinsic questions of ‘right and wrong’, the good and the bad, obligation and duty, consequences and intentions, as these apply in our conduct and relationships, where the right and the good are under consideration in themselves and not merely as instrumental to some non-moral goal such as profit or corporate image (cf. Potgieter et al. 2013:286–304). More recently, Grayling (2019:xvii) explained that the term ‘morals’ derives from a coining by Cicero from the Latin *mos*, *moris* (plural *mores*) which means ‘custom’ and even ‘etiquette’. Morality, he continues, is about our actions, duties and obligations, whereas ethics is about what *sort* of person one is. Although the two are obviously connected, they are equally obviously distinct.

In education, the rules and standards by which we live originally come from outside, from our parents, teachers and other significant people in our environment when we are still very young. However, as we grow up and gain a deeper understanding of our environment, conditions and circumstances, and gain insight into the rationale behind the principles and the rules that our parents and other educators have been imposing on us, we begin to develop our own standards, rules and principles. Some of these standards, rules and principles might have been taken over in their original form and became internalised, others might have been taken over in adapted form, some might be summarily rejected and others might have been taken over from other sources. This process forms an essential part of the forming of a world and life view, as explained by Van der Walt (1999:51).

In the discussion below, both these sets of rules and principles that determine and guide behaviour in children (at home, in school and in every walk of life) occasionally feature in the discussion. The emphasis, however, is on the moral aspect, on morality – in other words, those principles, rules and standards that are to be internalised by the young person, which have to rise internally, from the inner being, the conscience of the person, as it were.

The remainder of this chapter is structured as follows. The section 'The research method followed' contains a brief outline of the research method that was followed in constructing the argument that unfolds in the chapter. The section 'Two key theoretical perspectives on education and discipline' contains the two broad biblical perspectives without which a biblical or Christian view of discipline cannot be developed and understood properly, namely the Great Mandate and the Great Commandment.[2] These provide the backdrop for a discussion of discipline from a Christian or biblical perspective based on a number of scriptural analyses.

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[2] Christians are also aware of the Great Commission, the duty of witnessing personally to those who do not believe in Christ (Mt 28:18–20), and the Great Community, the members of which share one another's burdens, share all good things and do good to all people, especially those who belong to the family of Christian believers (Gl 6). Christian engagement today means overcoming the discourses of separation between Christianity and culture, church and state, religion and state, and similar other binaries which today dominate the lives of most people (Swamy, Paluri & Koshy 2018:4). The Great Commission and the Great Community also have implications for discipline at home and in the school, but not as explicitly as in the case of the Great Mandate and the Great Commandment.

The section 'Some practical ethical tools available to educators to instil a biblical moral compass in the hearts and minds of the young' contains ethical and/or moral perspectives and their implications for discipline in pedagogical contexts. The chapter concludes with perspectives drawn from the discussion, thereby forming a coherent picture of a Christian ethical–moral approach to discipline, as suggested by the title.

■ The research method followed

The theme of this chapter calls for a biblical or scriptural approach, though in a perspectival and not a fundamental(ist) sense. As will transpire as the argument unfolds, core perspectives of the Bible such as the Great Mandate and the Great Commandment and not necessarily an analysis of particular verses or texts from the Bible are employed to gain insight into the ethical and moral aspects of parental and school discipline. The core approach was that of scriptural interpretation to come to a deeper understanding of the discipline issue (Aldridge 2018:245–246). The interpretive approach followed in this case deviates from the standard view of interpretivism in that the researcher does not, as in the standard approach, try to understand the world of human experience to discover the reality through the views of participants, their backgrounds and experiences (Thanh & Thanh 2015:24) but rather to glean from the Bible those perspectives that might be relevant for parental and school discipline and to analyse and interpret them. As Van Huyssteen (2006) correctly observed:

> [*A*]s such we have no standing ground, no place for evaluating, judging and inquiring, apart from that which is provided by some specific tradition or traditions. In this sense, interpretation is at work as much in the process of scientific discovery as in different forms of knowledge; it goes all the way down and all the way back, whether we are moving in the domain of science, morality or religion … our epistemic task is to stand in a critical relationship to our tradition(s) and worldviews. (p. 46)

Simon Blackburn recently updated this view of interpretivism by stating that the scholar's mind actively interprets any data of the senses in the light of whatever ‘endowment of categories and thoughts’ (Blackburn 2017:17) have been developed by long processes of experience and learning.

Based on our understanding and interpretation of both the world in which we live and of the biblical perspectives about education and discipline, we have to find a way to create ‘a new order’, as Plotnitsky (2006:50) puts it – new insight and a new understanding. Reality is constantly being (re)constructed in interaction with others (such as the readers of this chapter) by assigning meaning to an event or experience, such as the above-mentioned hermeneutic interpretation of biblical perspectives on discipline. We build hypotheses about the way the world works, and we constantly test these hypotheses in an ongoing process of constructing and reconstructing. We adapt our view of a situation or a phenomenon, such as parental and school discipline according to the way we are able to perceive the events and experiences that occur to us and to which we react (Leutwyler, Petrovic & Mantel 2012:112). The processes of interpretivism and constructivism create opportunities for new knowledge to emerge (Labaree 1998:11).

Two key theoretical perspectives on education and discipline

The Great Mandate

Christian educators listen to and obey what has been termed the Creation or Great Mandate, namely that God has called human beings to be fruitful, to rule over the earth, and to work and take care of the Garden that he gave them (Gn 1:26–28, 2:15). To subdue and rule the earth means to have dominion over all of life, including the children that have been entrusted to parents and other educators such as teachers. In Scripture, as Van Brummelen (1994:27) points out, ruling and leadership always involve service. In other words, God gives authority to serve: to have dominion over the earth means to form and serve for the benefit of others.

The Great Mandate, according to Van Brummelen (1994:27), has two aspects. Firstly, creation does not remain static. God calls people (made in his image – Gn 1:27) to develop and unfold its possibilities, to be co-regents with a dynamic and loving God. God intended people to develop, unfold creation and thereby to be culture formers. This development, unfolding and culture forming also include the education of the children entrusted to educators. Parents and other educators such as teachers respond to this first aspect of the Great Mandate by engaging in the educational task of leading, guiding, unfolding, shaping, developing, training and nurturing (Nussbaum 2011:23) of the young entrusted to their care.

Secondly, God called on Adam to work and take care of the garden. 'Taking care' literally means to 'guard the sanctity of'. The garden was a place God had given human beings to keep holy in that everything in it should fulfil its intended function to God's glory. God entrusts human beings with his creation in all its complexity. This calling implies that young people need to be imbued with a sense of God calling them to be servants as they play and work in his world, his creation. Through careful guidance (i.e. education), young people should learn to take the Great Mandate seriously in that their daily contributions (at home and in school) should attest to their stewardship of their own gifts and of those around them. Through caring discipline, educators such as parents and teachers should support learners to become and be godly image bearers, with levels of responsibility appropriate for their levels of maturity. Educators imbued with this ideal would encourage the young to be and become committed to Kingdom service and to act accordingly (Van Brummelen 1994:28). Children who have received this type of upbringing would be able to exercise their God-given calling (mandate) to their people as the salt of the earth, able to proclaim the message of the Bible and particularly of Jesus Christ, in all aspects of society as the only hope for the world (Edlin 1999:40). Children who have enjoyed this type of upbringing (education) would be disciples – that is, followers –

of Jesus Christ. The semantic connection between discipling (making followers), discipleship (followership) and discipline (leading the life of a follower) is clear.[3] (The word 'discipline' is a derivation from Latin *disciplina* [teaching], from *discipulus* [disciple or follower]).

The Great Commandment

Christian ethics and morality are directly linked to the law of God as formulated in the Ten Commandments that represent a concretisation of the dual injunction to love God and the neighbour. In a sense, the Ten Commandments could be seen either as a summary of the entire message of Scripture, or the focal point of Scripture. Exodus 34:28 and Deuteronomy 4:13 and 10:4 refer to the Ten Commandments as 'the ten words' (hence the reference to the Ten Commandments as the decalogue). The law consisting of the 'ten words' itself can be found in Exodus 20 and Deuteronomy 5. These Ten Commandments are also widely referred to as the 'law' or the 'commandment' of the Lord (Rm 13:8–9). As such, it is a summary of the law of the Lord as a succinct concretisation of God's Great or Central Commandment to love God above all else and the neighbour as oneself. In contrast to the ceremonial laws promulgated for the people of Israel which were only temporarily applicable, the Ten Commandments represent the Great Commandment for all Christians of all times to adhere to. According to De Bruyn (2013:16), disobedience to any one of these commandments could have disastrous consequences for both transgressors and their community. Originally, before the fall into sin, these commandments were written in and on the hearts of all people, but the fall into sin has obliterated much of this law in the hearts of human beings. Some traces of the law have remained in the hearts of all people, which explains why most people still possess an innate sense of ethically and morally justifiable behaviour. These traces or remnants are, however, not sufficient for them to know the will of God fully, which is why God proclaimed the Ten Commandments by virtually writing them with his own finger on the two tablets (Ex 34:1).

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[3] Of course, Christianity is not the only religion that can lay claim to the inculcation of good discipline in upcoming generations. Davids (2018:672) states that Islamic education has an intimate connection to what it means to be and act as an ethical being. Inquiry into what education is and what it ought to achieve is consistently connected to notions of justice, human well-being, the social good and defensible social relations. Conceptions of education espoused in the Quran can neither be divorced from the propagation of good character, nor from the practising of just action and relations. Much the same could be said of most of the mainstream religions of the world (cf. McDowell & Brown 2009).

After the coming of Jesus Christ, God once again began writing the law on the hearts of his people through the inspiration of the Holy Spirit, much as used to be the situation before the original fall into sin (2 Cor 3:3), resulting in a situation where people do not depend on a law externally imposed upon them but one in their hearts that they can obey wholeheartedly (Jr 31:33). Owing to the persistent effects of sin in their lives, even Christians are unable to live completely in harmony with the law written in their hearts and minds (De Bruyn 2013:16–17).

The core tenets of the Great Commandment were reconfirmed in the Sermon on the Mount (Mt 5–7). Followers of Christ were given the task to ‘shine their lights’ by way of good deeds, by doing right. The exhortation to good deeds implies leading a life of discipleship that includes the spheres of both words and deeds. Christ’s followers are called to be the light of the world (Mt 5:14) and also the salt of the world (Mt 5:13), meaning that they should take upon themselves the responsibility for the well-being of the entire created order and not only for their own religious community. The disciples’ new designation as the ‘light of the world’ constitutes a renewed or reconfirmed commissioning (duty, task and calling) to be testimonies in the world of the eternal Source of Light, God the Father. They are called upon to become witnesses of the kingdom of God through their good works in the socio-political realm. Disciples (followers) of Christ are called upon to reach out to the socio-political structures and systems around them (Gangte 2018:55–58). The Sermon on the

Mount is also a reconfirmation of the Great Commission – namely to witness to the world and to work towards the well-being of all. The entire New Testament echoes the essence of the Great Commandment. Galatians 5:14 states, '[t]he entire law is summed up in a single command: Love your neighbour as yourself'.

Although, in principle, the Great Commandment plays a central and directing role in the lives of Christians – including parents, teachers and other educators who subscribe to scriptural perspectives as their guidelines in bringing up and discipling the young – ethical and moral conflicts regarding human relationships may arise. Such conflicts arise when two ethical or moral principles seem to contradict each other. An example of this is when the school decides to demote your child to the second hockey team, whilst you think that the child is the best in that particular position on the playing field. The child's tears intensify your sense of an injustice having been perpetrated against the child. A parent in this situation has a choice: either confront the team coach and demand to know why the child has been demoted, or accept the judgement of the coach and begin assisting the child with processing his or her disappointment. Christian parents would probably opt for the latter action because they know that an absolutist approach rarely works in situations of ethical or moral conflict. Borderline situations such as the one described here occur frequently, and the parent would have to act prudently (Vorster 2004:157).

In the case described here, the parent's choice is relatively simple. Confrontation with the school and the coach would probably not produce the desired result. The coach might merely state that the other child's performance in that particular position on the field has been better of late and that your child should practise harder. On the other hand, the coach might cave in and reinstate your child in the position but will in future be highly critical of the child and may occasionally even be abusive towards the child if his or her performance is not of the required standard.

The second approach is pedagogically more justifiable because it does not concentrate on the actions of the school or the coach but on the attitude and behaviour of the child who needs guidance, forming and disciplining. The wise parent would enter into a conversation with the child about how a coach is compelled to select players who of late have performed best in their particular positions in the team. The coach must also attend to the selection of players who form the best combinations on the field to have a chance of beating the opposition and to select players in accordance with his or her analysis of the strategies of the opposing team. By discussing the situation and by encouraging the child to persist with exercise to improve his or her performance on the field, the parent helps the child to understand the predicament. In this process, the child has received education – that is, has been formed, guided and nurtured.

Another borderline situation arises when parents get promotion and must move their family to another city many kilometres away from their present residence. The problem arises when parents realise that their child has just begun a term as student leader of the primary school. The child is too young to be left behind (in a hostel) and the parents are keen on taking up the new position. The parents' options are clear: either forfeit the promotion, or take the child out of school, which would lead to him or her losing his or her position as student leader, and to start building a new profile as a leader in a new school. The prudent parent would, again, engage in conversation with the child, in the process explaining the need to be able to care for the entire family and that the promotion would help in this regard (a larger salary). The parents would show understanding for the loss and disappointment of the child and would do everything in their power to soften the blow to the child's ego. They would support the child in every way and help him or her to adapt to new situations and to assert himself or herself as a leader in the new school. In doing so, the parents would have coped well with this borderline situation where decisions must be taken that are not necessarily to the advantage of all concerned. Some family members occasionally have to make sacrifices so that others can advance and prosper in their careers and in their lives in general.

Vorster (2004:157–163) offers three principles that educators (parents and teachers and other significant people in a young person's life) could take into account when dealing with such borderline situations. These three principles are in line with the precepts of the Great Commandment. The principles are: the teleological consideration; the deed or action should be motivated by love and the deed should be a reflection or image of Jesus Christ.

The *teleological principle* centres on the question whether (a good) end justifies (a less than desirable) means in a borderline or conflict situation. In some rare cases, the less than desirable means could lead to a good end. Having the child vaccinated against various diseases (with all the accompanying tears) could count as an example of the application of this principle. The second example discussed above could arguably also count as a case in point: taking the child out of school and causing him or her to lose the position as student leader of the school could be a 'means' for the family to attain a better future, on condition, of course, that the parents assist the child to regain his or her equilibrium in the new school surroundings and possibly assert himself or herself once again as a leader. However, as Vorster (2004:158) correctly pointed out, Christian parents, teachers and other educators must be careful when applying this principle. In saying this, he follows the lead of Mahatma Gandhi, who stated '[r]ealisation of the goal is in exact proportion to that of the means. This is a proposition that admits no exception'. In view of this, Vorster (2004) concludes:

> A more responsible approach will be to say that in the case of moral conflict, the end may justify the means as long as this point of view is not interpreted in an absolutist sense. A consequentialist approach may be useful, but should not be seen as the only decisive ethical directive. The argument must be used with due allowance for other related directives. Some other possible directives (have to be followed as well, such as acting out of love and imaging Christ). (p. 158)

The second principle, namely of the deed *to be motivated by love*, is directly derived from the Great Commandment. Christian love is one of the main driving forces of Christian deeds and is one of the main features of a Christian lifestyle. Several concepts are used in the Bible to describe the comprehensive love of Christians, but all of them point to the core meaning or characteristic of love, namely compassion. In considering a particular deed, action or choice, the Christian educator should above all show compassion with the other – that is, a true comprehension and promotion of the interests of others instead of a selfish centring on own interests and advantages. In doing so, Vorster (2004:159) avers, the Christian strives to show the true image of Christ: to live a life of compassion for true community, a life of understanding the implications of the sinful brokenness of the present. The implications for education and for discipline (disciplining = forming towards followership) of this principle are clear. All the decisions, actions or deeds of the educators described in the examples above should in the end be based on compassion for the interests of not only the family or the school (classroom) at large but also for those of the individuals who make up such communities. In some cases, some of the members of a group, such as a family or a class, would be called upon to make sacrifices in the interest of the entire community. In other cases, the community would have to compromise so that the interests of (perhaps) only one of its members might receive preferential treatment. In the end, all involved should feel that they have been part of a win-win situation and not a zero-sum situation where one party wins all and another loses all.

The discussion so far has already touched on the third principle, namely that one's deeds or actions as a Christian educator (parent or teacher) should be an *image or reflection of the attitude of Christ* (Vorster 2004:159). The attitude of the person committing an act is an important ethical or moral directive. The reality of sin and the brokenness of the world in the present dispensation tend to have a deleterious effect on people's decisions, actions and behaviour. Evil, according to Vorster (2004:160), is a condition of the heart, which eventually tends to corrupt life and society at large. To purify the attitude, the heart must change, because goodness springs from the heart which is the wellspring of action and of the structures that could be the eventual result of this action (Pr 4:23). Salvation in Christ and regeneration by the Holy Spirit turn the attitude away from selfish desires to the interests of others, which is the core imperative of the second part of the Great Commandment (to love others as much as the self). The attitude of the Christian when dealing with ethical or moral problems or dilemmas is modelled on the attitude of Christ; the ethics and morality of the New Testament is an ethics and morality of imitation or emulation of Christ (Jn 13:34, 15:12; Phlp 2:5). Philippians 2:5 reads, 'your attitude should be the same as that of Christ Jesus'. Christ is the model of self-sacrifice and total obedience to God; he was also committed to the regeneration of true humanity on earth (Vorster 2004:161). Like Christ, the Christian should become a servant and should be there for others (Jn 13:1–16). Christ's life was one of deputyship; the life of a follower of Christ should, therefore, also be a life of deputyship (the notion of 'having been sent to perform a particular task'). This deputyship and hence also the responsibility associated therewith lie in a complete surrender of one's own life to others. The attitude of a follower of Christ (a Christian) in a situation of ethical or moral conflict should also be characterised by the 'fruits of the spirit' as described in Galatians 5:22–26: love, joy, peace, patience, kindness, goodness, fruitfulness, gentleness and self-control.

All of the above comes down to the place and role of the conscience. The attitude of the conscience cannot be formalised in a set of rules which can be applied casuistically (that is, as a particular situation seems to indicate or demand) but rather takes the form of a moral compass for the conscience. The word 'conscience' is derived from the Latin *conscientia* – to know together with. Christ followers know together with their inner self, but above all with God, that an action or behaviour is essentially good or bad (see Vorster 2009). The conscience is the inner notion (in this case, of the Christian) that they are bound to the will of God in everything that they do and that they should evaluate their actions in the light of this insight. Vorster (2004) correctly says:

> One cannot escape the reality that, besides a consequentialist approach, a fair amount of situation ethics will also be at stake in (taking a particular decision or when doing something). (p. 163)

The implications of this third principle for parental discipline and for discipline in school are clear. Educators, parents, teachers and other significant persons in the lives of young people should first concentrate on themselves imaging Christ in their relationships with others, including the child (the learner in school), and should guide and form the child to learn how to image Christ in his or her own life. In this process, the educator should concentrate on assisting the child to combat his or her natural sinful instincts, particularly the instinct of selfishness and self-preservation at the cost of others and their interests. The child should be guided and nurtured to be not only aware of the interests of others but also to care for those interests. The child should be educated (led, guided and formed) to become an unselfish servant of others, to attain a sense of deputyship (an understanding of having been sent out to serve others and their interests) and to feel the responsibility associated with such deputyship. Children should also be brought to an understanding that all of the actions of their educators are aimed at assisting them to demonstrate the fruits of the Holy Spirit in their lives and to develop a conscience, as described. In the end, as is elaborated upon below, all of the above do not constitute bringing home a fixed or absolutist set of rules to children but rather a moral compass that will guide children or learners in all their future actions.

Case study: The predicament of educators attempting to discipline children or learners without an ethical and/or moral compass

The case

The outline and discussion above of the Great Mandate, the Great Commandment and the Great Commission constitute an ethical and/or moral compass in the lives of Christian educators (teachers, parents and other significant persons in the lives of the less mature). Those who prefer not to act (in this particular case, to discipline the less mature, the young) on the basis of such an ethical and/or moral compass, or who have had negative experiences with such a compass in their own lives because of their exposure to some toxic religious experience or other (the behaviour of the father-pastor in the *Poisonwood Bible* by Barbara Kingsolver comes to mind in this regard), find themselves in a difficult position, as can be seen in a paper by Human and Liebenberg (2001).[4] I quote at length from their work so as to present in relatively full detail their reasons for eschewing a Christian or biblical ethical and/or moral compass in their lives.

They begin their argument with a reference to deconstructionist John Caputo in which, according to these authors (Human & Liebenberg 2001):

> [*H*]e is aware of the extreme failure of objectivist ethics to help people live lives that are both morally responsible and fulfilling in terms of their own humanity. Because, unlike the church and our own moral upbringing try to tell us, living morally is not always

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[4] They arguably fall in the category of people who grew up in a toxic religious environment '(and) who found the whole thing ridiculous as they reached maturity, a common problem for religion today' (Caputo 2018:284). Caputo (2018:284) then goes on to make the following contentious remark, '[r]eligion flourishes in the soil of ignorance and poverty'.

> merely a matter of having proper ethics, of making the right choice.[5] (p. 14)

Deconstruction, on the other hand, 'takes the task of making one's way along an *aporia*, along an almost impassable road, where the ground may at any moment shift beneath our feet' (Human & Liebenberg 2001), and the *aporia* that Caputo speaks of:

> [*I*]s the way out of a specific moral dilemma; the way out of the moral quagmire of indecision; the way to clarity, decision and finality, the way to moral and ethical bliss.[6] (p. 15)

They then conclude that 'there is no one last ethical judgement that will enable one at last to sleep peacefully' (Human & Liebenberg 2001:15).

The aim of their (Human & Liebenberg 2001) contribution:

> [*I*]s to talk about ethics and morality by exploring some of the possibilities offered by looking at moral dilemmas (of whatever degree) from the experience humans often have of being stuck, coming to a dead-end, having no way out, et cetera. These metaphors relate to viewing life as a journey with a moral dilemma being an obstacle that hinders progression. (p. 15)

They (Human & Liebenberg 2001) continue describing their predicament by stating:

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[5] Caputo (2018:280) recently reiterated this view: 'The interpretive ground on which religion has stood for several millennia has shifted underneath its feet. That has resulted in a serious crisis. The great biblical narratives originated in an ancient imaginary and they now find themselves in a strange new postmodern one. That leaves pastors scratching their heads about how to preach and a lot of other people (sometimes including the pastors) scratching their heads about why they bother. Religious belief is fast becoming unbelievable. Religion looks ridiculous and, too often, makes itself look ridiculous. It is in serious trouble, and its condition may be terminal'.

[6] The Greek *aporia* literally signified an 'impasse, a difficulty in passage, a lack of resources and even puzzlement, a puzzle or the state of puzzlement'. It later also referred to doubt. In the work of the Greek philosopher Socrates, it signified a conundrum to which the answers are difficult to discover (Grayling 2019:115). The term gained new and expanded meaning in the work of deconstructionists such as Derrida. Human and Liebenberg use it in an even more extended meaning to explain their moral dilemma.

> We are not quite sure where we stand, or if we stand at all. It is not that we experience ourselves as drifting, or falling, or floating. It is much more a case of not being quite sure whether there is a map with which to specify our location, that is, of us being part of a labyrinth, or a maze or a web. We can, to some extent, explain how we got here; we can explain our own struggles with objectivist ethics, or we can explain our engagement with each other's stories, or with those of other people. [...] the problem comes in when we try to get some distance from our present (unspecified) location. Because, as soon as we lift off, we discover that we are part of a web of endless links, most of which we are not aware of and many others we have forgotten about. And to make matters worse – the web is without boundaries so that our very attempt at finding out where we are has exactly the opposite result. Our attempt to draw a map indicating our position results in yet another maze without a centre or boundaries. (p. 16)

They (Human & Liebenberg 2001) then quote the ethicist Vorster who stated in 1999:

> [*T*]he dominant discourse in (pre-modern) times was the idea that metaphysical forces – which religious groups called God – controlled everything. These strict moral guidelines were and are still seen as universal, normative, objective, timeless and a-historical guidelines for people.[7] As we all know this way of thinking about knowledge or 'truth' still exists in the post-modern period in which we live. (p. 17)

However, they (Human & Liebenberg 2001) continue:

> [*I*]n the current post-modern time period knowledge and 'truth' are not seen as phenomena that are revealed either through religious scripture nor discovered via reason, science and scientific methods, but rather as being constructed – socially constructed – between people. (p. 17)

Knowledge is now seen 'as a process between people' (Human & Liebenberg 2001):

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[7] This view is echoed by Grayling (2019:454) when he avers that 'the ethical debate resumed in the 18th century after more than a millennium during which the dominance of Christianity had silenced discussion of moral principles – the divine-command morality of the scriptures being assumed, or claimed, to settle all matters of right and wrong and how to live'. Human and Liebenberg seem to have grown up in an environment where this divine command view of morality still prevailed.

> Within the narrative and/or social constructionist metaphor it is important to understand that people construct their personal life stories within cultural stories. [...] The cultural stories (of the time in which we live) are (still) based on so-called universal, objective, normative, timeless and a-historical 'truths', which were either revealed to us as people by God through religious scriptures ... or discovered through reason, science and scientific method. (pp. 17–19)

These narratives are not deemed appropriate for the lives of, and for decision-making by Human and Liebenberg (2001) because they find themselves in an *aporia* as indicated above:

> We know the concept of *aporia* primarily from Plato's dialogue *The Meno* in which Socrates sets out to teach a youth a lesson in geometry. The boy is enticed to guess the area of a square and is then led step by step to realise that he was mistaken. He eventually arrives at a moment of embarrassment, a moment of not knowing, a moment where he has to realise that he does not know, which is the moment of *aporia*. Literally – he does not know the way forward – he is without a way.
>
> As far as morality and ethics are concerned, the idea of *aporia* relates to a metaphor of life as a journey. Within this metaphor, it follows, that such an *aporia* happens whenever one no longer has a sense of moral direction anymore [*sic*]. It happens every time someone has a difficult moral decision to make and there is no clear and definite way out. Yet within the objectivist ethical model this should not be so. The correct or proper moral thing to do should be clear, or if it is not clear, at least clarity should be found by just becoming familiar with the applicable rule. Objectivism claims that there are absolute moral laws, that they can be discovered by reason, and that they can be applied directly and objectively to real situations. So, within the objectivist tradition *aporia*, the experience of being lost, of not knowing where to go next, is simply a matter of not knowing the rules, or perhaps lacking the skill to apply the relevant rule to the particular situation in which one finds oneself. (pp. 20–21)

Human and Liebenberg (2001) continue:

> If one considers the event of *aporia* to be the moment of 'not knowing, of indecision', it becomes clear [...] that the hierarchical way of ordering information is at home within the objectivist paradigm, where things happen along fixed lines, depending on importance and significance relative to some unchanging truth. However, what would

> happen if one chooses to address the problem of *aporia*, of ‘having no way out’ of ‘being lost’ within a *rhizomatic* framework, one that ‘grows’ in all directions, allows passage along many alternative routes, with no governing set of rules, and where there is no hierarchy?
>
> The first thing that would happen is that there would be no search for an ultimate answer, no attempt at finding the absolute solution, no looking for moral gurus or other agents of ultimate truth. This will have immediate consequences for how one views such a state of ‘not knowing’. *Aporia* would no longer be a state to avoid at all costs; it would no longer be seen as a place to get out of as soon as possible. It would no longer be seen, as was the case with the student in the *Meno* as something to be embarrassed about. No longer would there be an attempt to find answers outside oneself, outside of some universal, a-historic truth dimension which has very little to do with the contingency of human life, and which all too often leads to a failure to take responsibility for one’s own life and decisions. (p. 22)

They (Human & Liebenberg 2001) acknowledge that:

> [*Some*] people simply do not know how to live without absolutes, they do not know how to live the life of uncertainty, which is why people believe that the way to curb relativism is by improving the rules. … But why should one talk about dismissing absolutes when so many people seem quite content to live with absolutes? For us two reasons are pertinent. First, more and more people are finding that objectivist ethics is inadequate for solving their everyday moral dilemmas. It is simply too rigid and constricting to cope with the rich tapestry of everyday living. Secondly since our readmission to the international arena, civil society can no longer ignore the fact that there are different worldviews and cultures laying equal claim in possessing the truth. As long as our society was authoritarian (especially white, Afrikaner South Africa), organised along strict hierarchical structures, it was possible for the church and other moral watchdogs to control people’s behaviour by enforcing rigid ethical rules. In such an environment people hardly dared to question the dominant cultural and religious discourses. With the opening up of South African society and the consequent exposure to the global village, which is, in essence, non-hierarchical, there has been a growing discontent with all forms of authoritarian power structures, including those that claim revelation and/or science as ultimate sources of power and truth. (p. 23)

They (Human & Liebenberg 2001) opted for the following as a recourse out of the ‘absolutist and hierarchical’ approach to ethics and morality:

> [*W*]e have decided to seek refuge in second-generation cognitive science. We do this, not only because we think this provides a quite credible way out of the impasse that results from the either/or of absolutism and relativism, but also especially because it addresses the fallacy that humans can make ‘truly rational’ decisions which are based on ‘pure’ logic. [...]
>
> Within the objectivist view of human beings they are seen as free, moral agents who can choose which, if any contextual features it will allow to influence its deliberations. Thus the moral agent purports to choose freely what aspects of its physical, social and cultural environment it will permit to have an effect on its actions. Yet such a view is highly problematic, because we are far more socially constituted, far more historically situated and far more changeable than objectivism allows. (pp. 23, 26)

They finally (for purposes of this case study) draw attention to the role of imagination. They (Human & Liebenberg 2001) hold the following opinion:

> [*I*]magination (plays a role) when humans have to make moral decisions, especially when they experience that they are lost, that they are in a state of *aporia*. [...] Humans use narrative and imagination to make sense of their lives. It is in this regard that Johnson and others suggest that one uses imagination and narrative whenever one has to make a difficult moral or life-changing decision, in our metaphor, when one experiences *aporia*. If one views moral deliberation as an imaginative process, and imaginative exploration of the possibilities inherent within any given situation, the decision to be made is not so much a choice between right and wrong, but a playing out of different life scenarios. In this process one has recourse to one’s own moral tradition, cultural myths, exemplary heroes, et cetera. One creates alternative stories, based on the possibilities and impossibilities inherent within one’s current situation, and taking into consideration one’s past, relationships, dreams, belief, et cetera. Note that there is no fixed rule as to which of these must have the biggest influence on one’s decision. Instead, the decision is primarily guided by one’s perception of which possibility will eventually have the most meaningful ending. This is impossible without using one’s imagination, because imagination is the primary means by which we compare, dream, evaluate, construct and tell stories.

> Of course, we are not saying that this approach will make moral dilemmas disappear overnight. The experience of being lost, of having no way out, is part and parcel of the life of every person who wishes to live a morally responsible life. But at least this approach will empower people in a way that is not possible within the objectivist paradigm. It recognises the complexity of human life and decision-making. It does not purport to provide easy, timeless and simple answers for the moral issues that people face every day. Furthermore, it recognises the historical, narrative texture of people's lives. It links up with the natural way in which human 'actually' make decisions daily. What is more, it demands a much greater responsibility from an individual in her or his world. In the objectivist view one only takes the 'right' decision, and then lives with the consequences knowing that God, the church or society has actually made the decision for them and they need not really bother themselves too much with the negative consequences of their decision. However, in the approach that we suggest, one is forced to come to grips with the full complexity of one's situation. No easy, ultimately correct decision is presupposed. (pp. 26, 27)

Discussion of the case

I quoted from the contribution by Human and Liebenberg (2001) to achieve three basic aims. The first is to illustrate the extent that people from a Christian background – such as these two authors, and hence those arguably acquainted with the Christian or biblical way of thinking about ethics and morality – have in our day and age relinquished the Christian way of thinking and consequently have become ethically and morally rudderless and have to resort to alternative ways of thinking that would not necessarily liberate them from their ethical and moral quandaries. The second aim is to critically evaluate their alternative approach to ethics and morality. The third is to show that much of these two authors' argument rests on misconceptions and misunderstandings, particularly with regard to the Christian or biblical approach to ethics and morality.[8]

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[8] It is interesting to note that theologian Muller (2001), in his response to the presentation of Human and Liebenberg, did not take issue with their understanding of Christian or biblical ethics and morality but rather concentrated on their scientific approach. In his third point regarding their line of argumentation, he touches on the role of religion in general in imagining morality and also on 'the true picture' painted by the authors of the church as 'the vehicle for objective and universal truths' (Muller 2001:37).

In all arguments, one's religious viewpoint and/or life viewpoint of departure is of key importance. Whereas I took as my point of departure the biblical precepts usually referred to as the Great Mandate, the Great Commandment and the Great Commission, Human and Liebenberg take as their point of departure the deconstructionism of John Caputo. This, in itself, cannot be contested in view of the widely recognised right to freedom of religion, convictions and assumptive values that we all enjoy, particularly nowadays in post-1994 South Africa. Human and Liebenberg's choice for a human-centred, and hence secular-humanistic point of departure, has led to a contentious train of thought about ethics and morality, one that is also tainted with a number of misconceptions and misunderstandings. My first point of criticism of their position is not that they have opted for a humanistic religious point of departure (they have every right to do so) but that it has led to a number of misconceptions.

One of the misconceptions (or misunderstandings) is their tendency to see Christian or biblical ethics and morality as absolute, even absolutistic, and objectivistic, even deterministic – in other words, as an objective set of fixed rules and regulations promulgated by Christian pastors and/or the church; a set of rules and regulations cast in concrete by the relevant authorities. They refer to these rules as 'absolutist and hierarchical', possibly because of the patriarchal nature of the Afrikaner community in which they grew up, characterised by 'dominant cultural and religious discourses'. Their experiences with these discourses have distorted their notion of Christian guidelines for a morally acceptable existence: they have been led to regard the ethical and moral rules imposed on them as fixed and final and supposed to infallibly show the way out of moral dilemmas. They have also come to see these rules or guidelines as formulated and imposed on people by God, the church and their educators, and that these authorities have made all the necessary moral choices for them so that they need not concern themselves about the consequences thereof. This explains their view of moral guidelines as ‘objectivized’, imposed on them by external authorities. Their experience with ethics and morality led them to see moral guidelines as hard and fast rules and regulations that have to be strictly obeyed – ‘laws’ not to be voluntarily internalised but rather to be seen as objectivist, pre-ordained and imposed from outside of the acting person.

As explained, however, this is not an accurate depiction of Christian norms and values. Christian or biblical ethics and morality are not supposed to be objectivized, to be hard and fast laws of the Medes and Persians.[9] Biblical guidelines are supposed to be ‘soft’ and gentle norms and values, meaning that they leave a person with the option of either obeying or disobeying them. They indeed can be transgressed and violated, but transgression and violation always come at a cost, as is explained below in terms of consequentialism. People indeed are occasionally confronted with borderline situations in which the way forward is not clear. This is where the three principles of teleology, action motivated by love and compassion, and the ideal to reflect and emulate the image of Christ come into action. These three norms or principles are also ‘soft’ and gentle and, therefore, can be violated – again, with consequences. Human and Liebenberg are correct in stating that humans enjoy freedom of choice. One is indeed free to choose but should be prepared to bear the consequences of a choice and take responsibility for it.

Christian norms and values are ‘man-made’ but have been derived from the Bible. In a sense, Human and Liebenberg are correct in assuming that they are socially constructed and, in many cases, sanctioned by religious authority. They do form the basis of a social contract between people living together in a community. Many of the norms and values posited by Christianity are also shared by other religions. They differ, however, from socially constructed norms and values in that their roots can be traced to biblical foundations and perspectives. They are not just the products of imaginative explorations of all the avenues available. Christian norms and values flow from a deep commitment to the Great Commandment and the Great Commission – the call to love the other as much as oneself and to witness to those who have not yet heard of the Great Mandate and the Great Commandment. One could agree with Human and Liebenberg that one should explore all possibilities that would lead to the 'most meaningful ending' – but what does 'meaningful' mean in a secular-humanistic context? Christian believers find meaning in a transcendent or 'vertical' perspective, namely living a life in obedience to God, in his service and in service of humankind.

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[9] Christian educators are wary of moral determinism – that is, the notion that moral rules are absolute and that a particular action may be considered wrong whatever the circumstances might be. Thompson (2013:93–94) illustrates this with the example of mercy killing: one person might see it as morally wrong, whereas another might see it as an act of mercy and hence morally justifiable. There is a fine line between absolutism and relativism, determinism and an attitude of ‘anything goes’. The section ‘Some practical ethical tools available to educators to instil a biblical moral compass in the hearts and minds of the young’ of this chapter deals with approaches occupying the space between determinism and relativism that educators could consider when disciplining young people.

The concept of *aporia* that Human and Liebenberg raise is worth considering in the context of ethics and morality. However, their expanded description of *aporia* is too radical and negative for application in the context of Christian or biblical ethics and morality.[10] To describe a borderline situation as a quagmire of indecision, a road with dead ends with no prospect of progress, a rhizomatic maze full of obstacles that hinder progression, is not reconcilable with a biblical perspective regarding human existence. Christians seldom find themselves in such depths of despair that a way out of it is not at all clear because they avail themselves of guidelines offered in the Bible. Christians live in the light of the Bible as the inscripturated Word of God, and their spiritual eye remains constantly fixed on Jesus Christ as the end and meaning of their faith. It is only when one loses sight of this that one lands in *aporia* of the kind described by Human and Liebenberg. As Tripp (2015:48, 64) observes, Christians 'are kingdom-oriented people' and not 'this-world- or people-oriented' people. Elsewhere, he (Tripp 2015:n.p.) states, '[t]he central theme of the Bible is a person, Christ' and not 'a set of practical-life principles'. One should live by the Spirit and not gratify the desires of sinful nature (Gl 5:16).

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[10] I am responding to the authors' extended (and arguably unwarranted) extension of the meaning of the term *aporia*. As mentioned, the core meaning of the word is inconclusiveness, indecision.

Finally, it is difficult to imagine a parent or a teacher finding themselves in *aporia* of the kind described by Human and Liebenberg, attempting to guide, lead, nurture and discipline a child or a young person. Persons finding themselves in *aporia* of this kind are per definition not qualified to discipline another person – that is, to attempt to make a follower of the other person (the literal meaning of 'discipling'). Why would one entrust a child to an 'educator' who is on the slippery slope of *aporia*? Human and Liebenberg (2001) conclude their discussion with the following remark:

> Of course we are not saying that this approach will make moral dilemmas disappear overnight. The experience of being lost, of having no way out, is part and parcel of the life of every person who wishes to live a morally responsible life. But at least this approach will empower people in a way that is not possible within the objectivist paradigm. (p. 27)

I agree; moral dilemmas or borderline situations (see the section 'Two key theoretical perspectives on education and discipline') will not disappear, irrespective of what one does to address the dilemma. The difference is that Christian Bible believers do not find themselves in the cul-de-sac type of *aporia* as described by Human and Liebenberg. At most, they occasionally have to deal with a borderline situation, and in such a situation, they have the three principles mentioned in the section 'Two key theoretical perspectives on education and discipline' to serve as guidelines in a moral predicament.

The road to good discipline (disciple-making) is clearly marked out in the discussion above. The parent or teacher-as-educator should take a firm religious point of departure and not a shaky people-oriented or situation-oriented one. Persons who engage in educating and discipling the young should have a proper view of what is meaningful in life in order not to fall into the trap of *aporia*. They should live by the Spirit and keep their eye on Jesus Christ and what he enjoined us to do in life. They should be committed to this religious Archimedean point – this will enable them to give concerted and responsible guidance to the young. In disciplining (discipling) the young, the educator should be committed to the principles flowing from the Great Mandate, the Great Commandment, the Great Commission as well as the Great Community of Believers. The educator involved in discipling the young furthermore should be *au fait* with the teleological principle, the principle of loving the other as the self and the ideal of imaging Christ in dealing with young persons and their behaviour. The disciplining or discipling educator should furthermore understand the nature of Christian or biblical norms, that they are essentially 'soft' and can be transgressed and violated, that such transgression is a choice and that one is free to choose how to act and behave but should also learn to be responsible enough to bear the consequences of one's choices in life.

Some practical ethical tools available to educators to instil a biblical moral compass in the hearts and minds of the young

Christian educators have a number of practical tools at their disposal when engaging with young persons in order to discipline and 'disciple' the latter – that is, to imbue the latter with followership (discipleship) in a biblical sense and to instil a moral compass in their hearts and minds. Here are some of the most useful tools when disciplining a young person.

Latitudinarianism (the setting of boundaries)

Latitudinarianism refers to the setting of boundaries or latitudes for acceptable behaviour. As children grow up, the educator engages with them to help them understand what behaviour would be acceptable in particular circumstances and what would not be acceptable and would be socially or otherwise sanctioned. Educators should guard against moral relativism – that is, the notion that there are no acceptable views about what is right and wrong, good and bad, and that every person should decide for himself or herself what would be good or bad in the particular circumstances. As mentioned in the discussion above, the disciplining educator should also guard against moral determinism or absolutism – that is, the notion that ethical or moral rules are hard and fast, cast in concrete and can in fact not be violated without serious repercussions, as if they were laws of nature. Educators should also guard against a laissez-faire approach: the notion that the educator should do nothing to guide the young, and let nature take its course.

Consequentialism (the principle of sowing and reaping)

I repeatedly touched on this aspect of discipline in the discussion above. Disciplining a young person at home or in school should always entail assisting him or her to understand the following sequence: as a free agent, one possesses particular freedoms (depending on age and/or maturity), and one of these freedoms is the freedom of choice; one is free to choose but should also be prepared to bear the consequences of one’s choices, and one should learn to be responsible when dealing with such consequences (cf. Gl 6:8). A warning against radical consequentialism should be sounded here, however. Radical consequentialists, also in the act of disciplining, believe that the morality of their actions should be judged solely by their consequences and that there is in principle no category of act that may not, in special circumstances, be justified by its consequences (Kenny 2008:224). Christian educators perform disciplining acts in full consciousness and awareness that their acts and behaviour are constrained by Christian lifeview and worldview principles and at the deepest level by biblical principles. They, therefore, never act without regard for the consequences, but they also contrive to guide the upcoming generations to also withstand the temptations of radical or pure consequentialism.

A utilitarian approach

The educator should distinguish this approach from blatant utilitarianism. Whereas the latter is an attitude of doing *only* what is deemed useful and practically successful in the circumstances without due recognition of all the other principles that might play a role in disciplining a child or a young person, the former is doing that which would be effective, efficient and practically helpful in the circumstances, particularly in the context of all the other principles discussed in this chapter (cf. Blackburn 2017:38). The utilitarianist parent, for instance, might find that spanking a child results in the child refraining from some form of inappropriate behaviour, and hence could persist with spanking as his or her (only) method of disciplining. The parent following a utilitarian approach, on the other hand, would consider all the principles and options that come into contention when dealing with unacceptable behaviour and might never find it necessary to mete out physical punishment. A utilitarian approach represents only one of the many arrows in educators' quiver, whereas utilitarianist educators have only one arrow in their quiver, namely just to do what is useful and 'works' in the particular circumstance that has to be dealt with. In a sense, a utilitarian approach to discipline is also consequentialist in that it understands moral value in terms of the outcome of actions, in this case, discipline (Grayling 2019:281; cf. consequentialism above). Although educators should be aware of the consequences of their disciplining practices, they should always first concentrate on following a deontological approach, namely to act in a principled manner, irrespective of the consequences. The Christian educator, therefore, would concentrate on disciplining in accordance with the four 'Greats' and the three principles discussed above.[11]

The no-harm principle

The Great Commandment enjoins us to love our neighbours as we love ourselves. We should, therefore, never act in a manner that would harm another. Our basic orientation in the process of disciplining the young is the well-being of the other, also the young and immature, and through doing so, also the well-being of the community of which the educator and the young are members. Educators should hence be intent on employing methods of disciplining that would not be detrimental to young persons' self-esteem or denigrate them in any way. John Stuart Mill ([1859] 2010) correctly remarked:

> The principle (of liberty of thought, in this case), requires liberty of tastes and pursuits; of framing the plan of our life to suit our own character; of doing as we like, subject to such consequences as may follow, so long as what we do does not harm (others), even though they should think our conduct foolish, perverse or wrong. (p. 21)

The stewardship principle

Young people should learn to care for others and the world around them – to show compassion with others and their circumstances. Christians believe that they have been put on earth with a Great Mandate: that they should care for the world and others and that they should show compassion and moral imagination. According to the stewardship approach, educators (the persons who discipline, in this case) hold that all their actions should serve God and be useful to their fellow human beings – in this case, the young person who is being guided and disciplined. Discipline, therefore, always occurs in the context of an understanding that educators have been called to govern creation on behalf of their Creator and that they have to serve him as well as their fellow human beings in all that they do (De Muynck & Van der Walt 2006:9).

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[11] Human and Liebenberg (2001) correctly rejected an absolutist approach to morality and hence to the application of disciplinary measures. Absolutists, in contrast to (utilitarian) consequentialists, believe that there are some kinds of action that are intrinsically wrong and should never be done, irrespective of any consideration of the consequences (Kenny 2008:224).

The *paideia* principle

In disciplining a young person, educators should guard against inordinately strict rules and principles, against military-style order and discipline. The classic *paideia* principle is an excellent guideline in this regard: everything should be done to develop, guide and unfold the young person into a fully fledged mature human being, well-rounded in every respect, a well-brought-up individual (Blackburn 2017:89).

The well-being principle

Educators' entire engagement with young persons, including all attempts at disciplining them, should be aimed at improving the well-being of the latter. This principle resonates with the Great Commandment and with the no-harm principle discussed above.

The pragmatic principle

In some circumstances, the disciplining educator should ask himself or herself what course of action would 'work best' in the particular circumstances. They could ask themselves what would be to the advantage of the young person, to the educator and to society or a community of which the young person is a member. This principle dovetails with what has been said about the utilitarian approach.

The tolerance principle

All Christians are aware of the residual role of sin in their lives, in the lives of others and in their communities. Whilst on the one hand being patient with and tolerant of the shortcomings of others, the disciplining educator should strive to give such guidance to the young so that they can overcome the negative effects of sin. As Van der Walt (2007:202–203) remarked, educators are not called upon to agree with everything a child does. Tolerance can be defined as the degree to which educators accept the things that they disapprove, understand the differences between people and their behaviours, and learn how to differ from them. Educators and young people should learn to live alongside one another without destroying the other and without merely ignoring and trivialising their differences. To do so, says Van der Walt (2007:202), 'is the genius of tolerance'.

Kant's categorical imperative

Disciplining educators could consider applying Kant's categorical imperative, namely to teach the young to act only on that maxim 'by which one can at the same time will that it should become a universal norm' (Thompson 2013:91–92). This principle means, according to Wood (2018:xxi), that disciplining educators should act in such a way that they could will the principle of their particular disciplining action to be a norm valid universally for everyone. This principle demands that they take the universal standpoint in judging how to apply an assumed duty, such as disciplining a child, where one would be tempted to exempt oneself from the duty in a way that indulges one's self-love or one's personal inclinations.

Rousseau's sublime maxim

Educators engaged in the process of disciplining the young could also consider applying Rousseau's maxim of doing unto others as you would have them do to you (Comte-Sponville 2005:8–9).

Compassion, fugitive empathy or moral imagination

As mentioned, educators should also employ their imagination in the process of disciplining the young. They should contrive to place themselves in the shoes of the young person, try to imagine what it could be like to be a young person in this day and age, and then offer guidance concomitant to the situation of the youngster but at the same time in alignment with their personal principles as a Christian educator. Educators should, as Wright (2009:419) aptly put it, develop the ability to intimately comprehend the other's motivation, to share his or her experience virtually and know it from the inside.

Situation ethics and casuistry

Educators should be sensitive about the demands of the particular situation in which disciplining a child seems indicated. However, in all cases, the basic principles behind a biblical approach to discipline should never be compromised just to 'save a situation'.[12] The problem with casuistry is that it might amount to the arbitrary application of a principle, depending on the situation, and not impose it as a rule or common standard for behaviour (Thompson 2013:94).

Developing a moral compass and the shaping of a moral conscience

Education in general, and the disciplining of the young at home and in the school environment, demands that educators should be in possession of a moral compass. The entire contents of this chapter – particularly the parts dealing with the Great Mandate, the Great Commandment, the Great Commission and the Great Community, and the principles of teleology, loving the other as the self and imaging the attitude of Jesus Christ through the working of the Holy Spirit – provide educators with such a moral compass, without denying that people with different orientations might also succeed in attaining similar moral compasses. Children, the young, the immature and school learners all need firm guidance in accordance with a moral compass.

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[12] Some educators might regard such a firm stance as a form of determinism or absolutism, as discussed in the case study above.

A second perspective – flowing from the distinction made at the beginning of this chapter between ethics, as principles, norms and guidelines imposed from outside by authorities in a person's life, and morals or morality as norms, principles, values and mores that have been successfully internalised – come into play in the context of shaping a moral compass in the hearts and minds of the young. Education – that is, the process of shaping, forming, guiding, unfolding and nurturing the young – should be focused on assisting young persons to internalise the principles, norms and values brought to them from the 'outside' by their educators, such as parents or teachers. This process of internalising such principles, norms and values contributes to the forming of a moral compass in the minds of the young as future adults who will, in turn, help others to internalise the values. This process also contributes to the shaping of their morality or moral conscience. Having a conscience is to know what is 'good', what the 'right thing' to do is – what we 'should' do in particular circumstances (Thompson 2018:117).

Good discipline in the lives of young people, as future adults, depends on the success attained with these two aspects: the inculcation of a moral compass in the hearts and minds of the upcoming generations; and the shaping of their moral conscience.

■ Conclusion

The Christian approach to disciplining the young in the parental home and in the school is by no means 'easier' or 'more straightforward' than any other. In many respects, its key notions correspond with those of other mainline religions' approaches to discipline and even in some respects with approaches that are not usually regarded as a religion, such as secular humanism. The distinguishing feature of disciplining from a Christian point of view is that it is based on the precepts and perspectives flowing from the Bible, which is the inscripturated Word of the Triune God, inspired by the Holy Spirit, and that it strives to follow the injunctions of Jesus Christ (cf. the Sermon on the Mount) and to emulate his image in dealings with youngsters in the disciplining (the follower-forming) process. It also differs from other approaches in that it offers clear and firm signposts for the educator to follow in the disciplining process, such as the teleological principle, the principle of being driven and inspired by love, and the principle of following the example of Jesus Christ. At its deepest level, it differs from all other approaches in that it is rooted in the four 'Greats': the Great Mandate, the Great Commandment, the Great Commission and the Great Community. Based on all these principles and perspectives, it strives to shape the young at home and in school to become mature and ever better members of society, able to enter into a social contract with all the members of society and to behave in the interest of all those with whom they come into contact, responsible and able to bear the consequences of their moral decisions.

Chapter 2

Positive discipline in South African public schools: A metasynthesis of best practices and strategies

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Abstract

The South African system lacks, amongst other shortcomings, orderliness and interpersonal harmony. In this generally ailing South African public school system, the extent of orderliness and interpersonal harmony are prominent indicators of the level of functionality of a school. Learner discipline has, therefore, been a point of interest for numerous education researchers in their search for best practices and solutions. The question is: can the most salient findings of these studies shed light on best practices? This chapter presents the gist of a selection of completed studies since 2000 in which numerous educators from a large variety of contexts participated. Deeper insight is provided into learner discipline in South Africa by means of a metasynthesis of the findings of such studies. The integrated interpretation, as part of a metasynthesis, ideally offers a more comprehensive and deeper understanding of the original findings.

Introduction and background

Dealing with learner misconduct seems to be a challenge for educators and schools worldwide. In fact, one of the endless hindrances for order in the teaching and learning environment is directly related to learner misconduct (Russo, Oosthuizen & Wolhuter 2015a:xviii). In many places across the world, disruptive conduct of learners comes at a high cost (Russo, Oosthuizen & Wolhuter 2015b:105). Not only does this entail 'costing' in the financial sense of the word, but it also has a negative, distracting effect on the teaching and learning atmosphere in the classroom. In addition to the fact that it hampers and frustrates the educators in their teaching and didactic endeavours, it also infringes on the rights of the rest of the learners in class to benefit from uninterrupted learning.

Globally speaking, and in general, there seems to be a multitude of factors underlying learner misconduct. Some of these are related to aspects embedded in society, the socio-economic conditions, conditions at home, the school system, the attitude or behaviour of parents at home, or the conduct of their teachers and peers. In particular, research has confirmed some of the following tendencies in this regard: a breach of duty by or negligence and/or reluctance of educators; a lack of learner support systems; the absence of an effective code of conduct; a lack of collaboration between schools and parents; and a lack of mutual respect amongst the role players in education (Russo et al. 2015a:20–70).

Regarding factors influencing learner conduct, in South Africa, a slightly different picture prevails. Local research results tend to lean more towards socio-economic factors being a key cause of learner misconduct. Some of these socio-economic factors include poverty, parents who are working long hours, single-parent homes, divorce and the absence of a father, the little time children spend with their parents, a lack of parental respect for authority and living in a violent community (Eloff 2009:28; Emekako 2015; Oosthuizen 2018).

The international trend pertaining to the forms of misconduct ranges from minor to serious forms of misconduct. Minor forms of misconduct that frequently occur include late-coming, failure to complete homework, reluctance to submit assignments, truancy, disruptive behaviour, rudeness, disrespect towards educators, forgery and using mobile phones during class without permission, cheating during the writing of tests and examinations, as well as improper attire (Russo et al. 2015b:105). Serious offences include transgressions such as violence, assaults, physical and verbal threats, theft, vandalism, substance abuse, sexual harassment, gang activities, extortion and intimidation. Although the aforementioned transgressions occur less often than the minor offences, reports have shown almost universally that these forms of transgressions in schools have increased dramatically since the use of technology in schools (Russo et al. 2015b:105).

The manifestation of the different forms of learner misconduct in South Africa is rather like that of other countries. Local research endeavours identified the following forms of minor misconduct to be the most frequent (Eloff 2009:99; Oosthuizen 2007:3; Serame 2011:53): telling lies, moodiness, rudeness, neglect of duty, homework not done, dishonesty, obscene language, untidiness, absenteeism, cheekiness, late-coming, disrupting class, leaving class without permission, absenteeism, using cell phones in class and tardiness. Examples of serious misconduct that were reported are theft, bullying, violence, fighting, gang activities, *crimen iniuria* cases against learners (and sometimes against educators), sexual harassment of fellow learners, drug abuse, drinking alcohol at school, vandalism, pornography and cheating during exams or tests. Moreover, in accordance with the international scenario, it also seems as if some forms of serious misconduct might be on the increase. In this regard, some of the recent media reports are as follows:

- When a teacher tried to take a cell phone from a learner who was busy talking on it in class, he was attacked and assaulted by two learners (Krüger 2018:6).
- A 15-year-old boy stabbed and killed a 14-year-old female learner with a pair of scissors at a school in Sebokeng (Du Plessis 2019:14).
- A 17-year-old girl stabbed an 18-year-old learner to death near the school entrance of a high school near Delareyville (Cilliers 2019:1).
- A 24-year-old male teacher from a high school near Zeerust was stabbed to death by one of his learners the moment he entered the class (Cilliers 2018:9).
- A Grade 10 learner of Mbombela assaulted and injured an educator in class (Hancke 2018:3).
- A learner of a high school near Bothaville punched the school principal in his face and broke his glasses (Van der Walt 2018:10).
- The first 8 months of 2019 saw 40 assaults with knives in schools of the Western Cape (Meyer 2019:17).

- A learner from a primary school in Kempton Park bullied and severely assaulted a fellow learner to such an extent that blows to the head of the victim resulted in concussion (Kusel 2019:4).
- A 16-year-old learner in the Eastern Cape was arrested after he had stabbed a fellow learner to death after an argument over a lost phone (Kemp 2018:4).
- A Grade 9 learner from a secondary school in Bloemfontein was caught making a video on his cell phone of a female teacher's underwear by strategically holding the cell phone under her skirt whilst she was standing next to him. Consequently, he was suspended for 1 week by the school governing body (Van Rooyen 2016:3).
- The headmaster of a school in Kraaifontein was injured after having been strangled in his office by two of his learners (Marais 2016:1).

A wide variety of methods for dealing with learner misconduct are applied worldwide. Theoretically, these methods can be categorised on a continuum, ranging from retributive approaches, which are punitive by nature, to preventative strategies (Russo et al. 2015b:106). Retributive approaches could, for example, include excessive, humiliating punishment such as corporal punishment, which is still applied in some counties, more often in 'nonhuman rights' countries. In human rights countries, there seems to be a pendulum swing towards preventative approaches, placing an emphasis on more of a 'Weberian' relationship style based on a sound relationship between educators and their learners (Russo et al. 2015b:108).

For example, in the United States of America, the traditional focus in dealing with misconduct was the zero-tolerance approach. However, over the last decade or more, there has been a pendulum swing towards the application of positive disciplinary measures. Based on comprehensive research conducted by the US Department of Education (USDE 2014) on positive discipline in schools, they found the following:

- the application of positive discipline helped teachers in meeting their goals
- it assisted learners to achieve better, enhancing an upward achievement curve
- it helped to increase the school graduation rates
- whilst teacher satisfaction levels were elevated, the teacher turnover rates in schools decreased
- low-performing schools were turned around, showing better performances.

In South Africa, in terms of Section 10 of the *South African Schools Act* 84 of 1996 (RSA 1996b), corporal punishment as a retributive form of discipline was prohibited. Currently, a variety of preventative methods, as attempts to be proactive, are applied for dealing with learner misconduct (Oosthuizen, Rossouw & De Wet 2016:145). Some of these methods – generally referred to as 'positive discipline' – are based on sound relationships, including effective communication practices, between all parties concerned, namely between educators and learners as well as between parents and educators. In addition, some of the other aspects emphasised include sound didactics-related applications by educators, the application of sound regulatory measures, the establishment of mutual trust, displaying mutual respect, caring, the encouragement and motivation of learners as well as the enhancement of learner participation and the promotion of learner individualism.

■ Conceptual and theoretical framework

Education is essentially prospective by nature – a well-established characteristic of sound education practice. Already eight decades ago, Gutsche (1941:32) maintained that education in South Africa, amongst others, seeks to guide children towards future adulthood and maturation and to attain essential skills to become independent future functionaries of society, serving their communities in a commendable manner. Based on Gutsche's point of view, Oosthuizen and Bondesio (1988:72) typified educational discipline as being essentially prospective in nature. In addition, Golman and Page (2010:360) highlighted that belief-based learning as such is prospective. Nonaka (2017:750) iterated the latter and added that human learning is prospective in the sense that, under the guidance of adults, it reaches 'in advance to a new stage of the developmental process'.

The concept of 'education' is captured in the Greek words *paideuo* (verb) and *paideia* (noun). The former primarily means 'to train, to instruct or to teach a child' (*pais*: child) (Vines, Unger & White 1997:175). The manner in, or process by which the instruction or training is done is connoted in *paideuo* or *paideia* by the concepts 'to correct', 'to discipline' or even to 'chastise a child' in a firm but gracious approach with the purpose of forming the child's character (Vines et al. 1997). An analysis by these authors of the various ways in which to perform education or instruction refers to methods or manners of discipline on a continuum ranging from correction to chastisement. However, it is vital to take note of the qualifying section of the former phrase which specifies: 'a firm but gracious approach with the purpose of forming of the child's character'. This entails the prospective approach to ultimately attain the best interests of the child as vested in the intentions of the educating disciplinarian. As the actions of educators centre on their inclinations or intentions, the actions of educating disciplinarians should be prospective by nature.

Broadly speaking, the educator (or parent) as disciplinarian could be inclined towards mere self-centred retribution, seeking to avenge or punish. On the other hand, the disciplinarian could correct the child with the intention of serving the child's best future interests. The latter approach with its prospective inclination (i.e. 'positive discipline') is the focus of this chapter.

Alfred Adler (1870–1937) – an Austrian physician who was also the pioneer of 'individual psychology' – is one of the proponents of what is today generally referred to as ‘positive discipline’ (Meyer, Moore & Viljoen 1994:99). The work of Adler (1969) originated from his critique on the views of Sigmund Freud. Whereas Freud’s work emphasised internal conflict, Adler’s philosophies were based on a belief that humans are purposeful beings with a free will enabling them to set objectives for their own lives and to steer it in accordance with what he called a ‘creative self’ (see Adler 1938:254). In addition, he also argued that human nature is constantly striving towards perfection; being on a continuous mission towards a higher plane of functionality to attain one’s goals – a mission to be a complete individual (Meyer et al. 1994:106).

Adler (1927:121) regarded humans as physically weak, belonging to an inferior species. Human weakness, he argued, resulted in a quest for survival and superiority vested in humans’ intellect and technology as well as their reliance on societal structures. In this regard, Gfoerer, Nelsen and Kern (2013:296), referring to Adler, said that children have to rely on, for example, their family structures and schools to support and guard them on their journey along the way to maturation and adulthood. Referring to Adler, Gfoerer et al. (2013:296) point out that ‘children’s need for social support as well as the necessity to belong are essential protective factors and crucial elements in their progress towards independence and maturity’.

Especially in Austria, Adler had a notable influence on education (Meyer et al. 1994:110). This was mainly because of psychotherapeutic approaches whereby he addressed antisocial conduct by, with the eventual purpose of re-educating the person, showing sincere interest and attempting to win the person’s confidence. His approaches to discipline, for example, basically emphasised the cultivation of positive relationships with learners and students. He appealed to a person’s ‘insight, private logic, stimulating his or her social interests to restore his or her primary goal – to belong’ (Meyer et al. 1994:110). According to Meyer et al. (1994:110), Adler argued that the ‘quest for human superiority’ is attained when persons get involved in serving society and, in addition, could also be activated to participate in the future development of the world around them.

Today, in the 21st century, it seems that many of these approaches related to Adler's philosophies have been widely accepted and constitute what is now generally referred to as 'positive discipline'. In 2014, the US Department of Education published a policy document with the objective of creating positive school environments (USDE 2014:1). The document describes positive discipline as a policy that places 'high expectations regarding student behaviour on a footing of consistent, stipulated and required conduct' (p. 11).

An analysis of various appearances of positive discipline in modern-day educational practice showed that the followings prevail (Zulu, Oosthuizen & Wolhuter 2019):

> [*E*]ncouragement of students; positive time-out sessions; private communication and appealing to a student's private logic; meetings with parents, family and the class; group discussions; and the encouragement of student participation and involvement in community and/or group activities'. Factors that influence the process include inculcation of communitarian principles; building of relationships; mutual encouragement; and building of trust, respect and caring. (p. 179)

South African research endeavours over the past decade emphasise various forms of positive discipline. To identify the best practices and strategies in the application of positive discipline, a synthesis of already conducted research is essential.

■ Aim of this chapter

The aim of this chapter is to determine and analyse the best practices, strategies, methods and approaches identified in, and amalgamated into local research on the application of positive discipline in the South African teaching and learning environment.

Research design and method

This study offers a metasynthesis of studies conducted on learner and student discipline in public schools. According to Glass (1976), the metasynthesis approach originally developed from human sciences-related quantitative approaches. This approach is employed as the most appropriate method for the purpose of this chapter based on its inherent characteristics and qualities, which are suitable to reach the central aim of the chapter.

Meta-analysis and metasynthesis

In Bloom's well-known taxonomy, analysis and synthesis are associated with cognitive processes according to which analysis takes the form of appraisal, comparison, contrasting and differentiating between elements in the data. At a higher cognitive level, a synthesis can develop from the prior analysis of the original data, characterised by a new arrangement, a new composition, collection and construction. Synthesis can be described as 'a process resulting in a product, a "whole," which is more than the sum of its parts' (Barnett-Page & Thomas 2009:8).

In their discussion of the further mining of databases – especially in the context of mixed-methods research – Creswell and Plano Clark (2018) distinguish between the use of analysis and synthesis in research. They refer to 'efforts to push quantitative results into meta-analyses' and 'qualitative results into metasyntheses'. Their point of view departs from the distinction of Bloom as discussed: Creswell and Plano Clark (concurring with Barnett-Page & Thomas 2009:8) do not regard analysis and synthesis as cognitive processes at different levels but rather as research processes linked to the type of data with which the researcher engages, namely quantitative or qualitative.

There is no consensus, though, amongst researchers as to which term should be preferred, and the terms 'meta-analysis' and 'metasynthesis' are sometimes used interchangeably where they basically refer to the same actions. Whilst acknowledging some scholars who are inclined towards the term ‘metasynthesis’ because they regard it as more interpretative, Timulak (2009:591) prefers the term ‘qualitative meta-analysis’, where the researcher attempts to administer the process of secondary analysis on primary findings. This secondary analysis (De Vos et al. 2011:385) has a different goal than that of the primary researcher. Various advantages are associated with such a secondary analysis, as discussed later in this chapter under the section ‘Data analysis approach’.

The approach that we adopted in this research concurs with that of Bloom. To offer a metasynthesis of the original findings, we followed a linear process whereby we first analysed the available data from which a metasynthesis was eventually constructed. The result is a new composition of the original findings after the primary analysis (Glass 1976:3) completed during the respective studies to gain a deeper understanding than could be reached in each individual study. Our approach corresponds with one of the approaches identified by Sandelowski and Barrosso (2007:18), namely, to synthesise findings of studies conducted by multiple researchers in the same field. Sandelowski and Barrosso define this approach as ‘an interpretive integration of qualitative findings that are themselves interpretive syntheses of data’. Barnett-Page and Thomas (2009:8) concur with the latter and define a metasynthesis as an integrated interpretation of findings which ‘seek(s) to push beyond the original data to a fresh interpretation of the phenomenon under review’. Such a process has a worthy purpose because it gives the researcher the opportunity to develop and reflect (Bondas & Hall 2007:116).

Focus and data demarcation

Because of the prominence of learner ill-discipline in public schools, researchers from various scholarly fields – such as education law, education management, comparative and international education, educational psychology, curriculum studies and learner support – have shown specific interest in this phenomenon for the past two decades. These scholars understandably explore the phenomenon from different perspectives.

We had to demarcate the topic to ensure a manageable volume of data. Firstly, we decided to limit the sources to research done within one faculty and to research in the three closely related fields of education law, education management, and comparative and international education. Secondly, we decided not to focus on all factors that play a role in learner discipline identified in the various studies. By including, for instance, all the causes and influences internal and external to the school environment, the effects on different stakeholders, and all the managerial and legal challenges posed by learner ill-discipline, to name but a few, would inevitably have led to an unmanageable dataset and a superficial analysis. During an initial survey of the completed studies, one prominent theme emerged, and after careful consideration, we decided to limit our data to the notion of positive discipline, which thus formed the phenomenon to be investigated. Our focus, therefore, was on the findings regarding practices, strategies, methods and approaches associated with positive discipline as applied by educators, school management and school governing bodies and to a certain extent by parents as part of their partnerships with schools.

Data were first collected from master's and doctoral studies linked to an overarching project on learner discipline in South African public schools conducted within the Faculty of Education of the North-West University. This dataset consisted of the findings from eight master's and four doctoral studies. A variety of empirical studies conducted by staff members from this faculty and their collaborators were then analysed. The findings from these primary studies provided sufficient data for this metasynthesis.

Data analysis approach

Three stages form part of thematic synthesis, according to Thomas and Harden (2008:1): ‘the coding of text “line-by-line”; the development of “descriptive themes,” and the generation of “analytical themes”’. During the identification of the descriptive themes, the process is still on the level of the original studies that form the database. Once analytical themes have been generated, a deeper level of understanding of the phenomenon is reached.

During the secondary analysis of the original findings of the studies – limited to practices, strategies, methods and approaches associated with positive discipline – some themes emerged as part of the metasynthesis process. Some of the advantages of secondary analysis (De Vos et al. 2011:385) are that it assists the researcher(s) with the verifying of data; it develops a sound scientific stand; and it is retrospective, thus providing the researcher with reflection opportunities. During this secondary analysis, we selected the most salient elements from the data (De Vos et al. 2011), whereafter the metasynthesis was done.

Research results

Themes and findings on the phenomenon – namely practices, strategies, methods and approaches associated with positive discipline – were extracted from the variety of completed studies. The research done in each study related to unique contexts. Whilst the same or similar adapted instruments were used across some of the studies, none of the studies were conducted in the same environment. The selection of participants or respondents also varied significantly. The variety is also notable in that studies with qualitative as well as quantitative research designs were included. An overview of the themes that emerged from this study are tabulated in Table 2.1.

TABLE 2.1: A synoptic overview of overarching themes and subthemes of positive discipline.

Themes	Sub-themes
Theme 1: Educator-related strategies and methods	• Holistic development of the child • Didactic skills level • Classroom management • Interpersonal relationships • Value-driven and culture-related strategies
Theme 2: Parent-related strategies and methods	• Teacher–parent interaction • Parent–teacher–learner interaction

Overarching theme: Positive discipline

During the metasynthesis, one central theme emerged, namely, positive discipline. Only a limited number of studies that specifically included the term or concept of positive discipline were sampled. The findings, nevertheless, revealed that various practices, strategies, methods and approaches can be linked to positive discipline. Although there is a pendulum swing towards positive discipline – especially in countries where human rights are adequately acknowledged and protected – this approach is (still) not applied in all corners of the South African educational scenario (Russo et al. 2015b:90, 91).

What was remarkable from the beginning of this metasynthesis was that the various researchers were instinctively looking for solutions that may yield a positive result for the child. Not only proactive strategies – those aiming at preventing ill-discipline and establishing ‘well-mannered’ conduct – but also reactive methods eventually had positive outcomes for the child in mind. Yet, in the research in which this chapter reports, positive discipline is not regarded as an infallible, watertight solution for ill-discipline. In a section on management of strategies for learner discipline (Emekako 2015:113), only 32% of the (teacher) respondents of that particular district regarded positive discipline as a successful approach to managing learner discipline. The reason for the discrepancy between a general inclination towards positive outcomes for children during teaching and a lack of trust in positive discipline amongst these respondents may be that they were not well acquainted with the term, or that they had not experienced much success in its application (despite the value they attached to the notion).

Another explanation of the above discrepancy may be found in a study conducted outside the public school environment, namely Technical and Vocational Education and Training (TVET) colleges. Two groups of students enrol at these colleges in South Africa: those who completed their schooling up to Grade 9; and those who completed Grade 12 in a public school. The disciplinary challenges posed by a large part of TVET colleges can, therefore, comfortably be compared with secondary public schools. The mixed-methods research conducted amongst students and purposively selected experienced lecturers of a TVET college (Oosthuizen, Oosthuizen & Van der Bijl 2019:151) rated the levels of effectiveness of various ways in which positive discipline is applied in lecture rooms. Broadly speaking, some of the most effective applications of positive discipline identified in this research were as follows:

- student participation – students could participate during lesson presentations (mean score: 3.24 out of a possible 4)
- encouragement – lecturers encouraged students to enhance their self-respect (mean score: 3.10)
- lecturers were approachable and accessible (3.03)
- encouragement – lecturers enhanced a sense of accomplishment amongst students (mean score: 2.92)
- restorative justice (mean score: 2.72).

It is clear that, in the TVET sector, given that the lecturers teach, amongst others, adult learners and that the interpersonal dynamics in the teaching and learning context are significantly different, various strategies associated with positive discipline can be employed successfully (Oosthuizen et al. 2019:169).

Educator-related strategies and methods

Under this theme, four subthemes emerged, all pointing to the central role of the educator in the teaching and learning context.

Holistic development of the child

Eloff, Oosthuizen and Steyn (2010:128) – referring back to an earlier publication by scholars in fundamental education (Van der Walt & Dekker 1982:96) – reiterated that education entails much more than mere instruction and teaching. In the full sense of the word, education entails the holistic development of the learner towards maturity. It is clear from the findings of the studies that formed part of this analysis that the educator stands central to not only the teaching and learning processes in the classroom but to most matters pertaining to discipline and other aspects of the holistic development of the child.

In the introduction to his research on learner discipline, Buys (2015:1) quotes Rogers (1998): ‘Discipline is not a simple device for securing superficial peace in the classroom; it is the morality of the classroom as a small society’. Disciplining a child should, therefore, not be equated to mere order and obedience, seeing that it entails much more within the all-encompassing teaching and learning context, leading to the child’s holistic development, which is the ultimate goal of education.

Didactic skills level

The findings of a research project on learner misconduct conducted at secondary schools in the Southern Region of North West emphasised that the didactic skills level of the educator plays a vital role in the establishment of sound discipline (Oosthuizen 2007:24). The findings of this quantitative study showed the two best methods to secure sound discipline in a classroom are related to, firstly, the teacher's subject knowledge and secondly, proper lesson preparations by the educator.

This notion of didactic skills level was confirmed by follow-up qualitative interviews conducted with learners. Learners expect educators to keep their fingers on the 'pulse of the class' (Fryer 2007:33). They added that an educator, for learners to respond positively and to be actively engaged in the learning, should be able to apply various suitable didactic approaches during lesson presentations (Fryer 2007:33).

Wolhuter and Van Staden (2008:389), using the same questionnaire in a follow-up survey amongst a wide variety of secondary schools in the Free State, Gauteng and parts of North West, confirmed many of the former findings. The broad population in their research consisted of a diversity in their locality, cultural inclination, racial configuration as well as their historical backgrounds, which can be depicted as a true reflection of South African society. On certain aspects, the findings and rankings differed from those of the Southern Region's findings (Oosthuizen 2007): the two highest-ranked methods towards sound classroom discipline matched the educator's subject knowledge and proper lesson preparation. This confirmed the importance of the teacher's didactic skills level.

Serame et al.'s (2013:69) research amongst educators and learner respondents in a township secondary school confirmed the importance of proper lesson preparation by educators. Whereas the educator respondents regarded preparation as their primary method towards a successful, disciplined teaching environment, the learner respondents rated it as the third-best method. The learner respondents rated discussions or meetings as the best method and referrals to the school principal as the second-most effective method (Serame 2011:64).

Applying a mixed-methods approach, Emekako's findings at secondary schools in the Ngaka Modiri-Molema District of North West confirmed the aforementioned research results pertaining to the positive effects of sound lesson preparation by educators (Emekako 2015). In addition, qualitative data obtained from one of the interviews (conducted with an educator) aptly depicted the reasons behind the effectiveness of sound lesson preparation (Emekako 2015):

> From my experience in teaching, so many educators go to classes without proper subject preparation. When you are not good with your content and subject pedagogy, you will mess up in front of the learners and from the day you lose respect and [*their*] confidence, you tend to lose control of the classroom to them. (p. 141)

Oosthuizen (2018), rating the effectiveness of various forms of positive discipline in a TVET college lecture room, confirmed the importance of lecturers' high level of expertise in their field of specialisation (ranked third) and well-prepared lectures (ranked fourth). During an interview, a participating senior lecturer remarked (Oosthuizen 2018):

> [*A*] well-prepared lesson is the most important method to maintain student discipline. Students pick up when a lecturer comes to class unprepared and read out of the textbook. You cannot keep a student quiet if you are not prepared for a lesson. When all learning styles are included in a lesson every student will be kept busy and interested. (p. 87)

Another lecturer also emphasised the importance of showing students that he was committed by preparing proper lectures (Oosthuizen 2018):

> When students see that a lecturer is committed, they feel that they must be committed as well and then they become afraid to fail the subject. Committed students do not want to disappoint their lecturers. (p. 87)

A research project conducted at a TVET college in the Western Cape shed light on best practices on how to promote proper student conduct. In this instance, the quantitative data showed that the lecturer's subject knowledge and level of lesson preparation also ranked amongst the most successful three methods in dealing with student misconduct in the lecture room (Oosthuizen 2018:87). Qualitative data generated revealed that students can discern when a lecturer is ill-prepared for a lecture, which then leads to student frustration and boredom in class. It was found that well-prepared lesson presentations actually capture students' attention.

Classroom management

In terms of the *South African Schools Act* (RSA 1996b) and the Guidelines for the Consideration of Governing Bodies in Adopting a Code of Conduct for Learners (hereafter 'the Guidelines') (RSA 1998), the aim of a school's code of conduct is to establish an orderly and disciplined teaching and learning environment conducive to the facilitation of effective teaching and learning in schools in general. Item 5.1 of the Guidelines (RSA 1998) refers to the focus of classroom rules as being related to and supportive of the general school rules as taken up in the general code of conduct for schools but directed towards and focused on the classroom.

Research in one of the largest districts of North West (Emekako 2015:109) identified the drafting and application of classroom rules to be the second-most effective way to manage discipline in the classroom, with referrals to school principals as the best method. Seventy-eight per cent of the respondents indicated these (reactive) referrals to be effective and very effective, whilst 76% regarded (proactive) classroom rules to be effective and very effective.

Furthermore, the findings of Nthebe (2006:73) revealed the reluctance of some educators to deal with learner misconduct in their class-management processes. She also ascribed educators' approach to teaching as the main problem related to learner misconduct. In a good reflection of the gist of her (Nthebe 2006) findings in this regard, one of the participants in the study phrased his concerns as follows:

> I believe in most cases the problem of discipline is not with the learners but with educators. Educators are not trying enough to

> know how to handle the learners. Educators must be trained. You can have the best system of discipline in the world, but if educators do not know how to use the system, it is not going to help at all. Some educators have a natural and good way of dealing with learners. Educators need to know where to draw the line and really reprimand the kids. Disciplining by shouting at somebody is not really the answer. (p. 73)

Some of the elements of this perception show that some teachers do not apply the notion of positive discipline. Some express their frustration through verbal abuse, whilst others adopt a laissez-faire approach, following the route of least resistance in their relationships with learners.

Interpersonal relationships

It is noteworthy from the study of Oosthuizen (2018) that the most successful preventative method conducive to the promotion of sound student discipline in class is the endorsement of a supportive and friendly classroom atmosphere by the lecturer. A positive lecturer–student relationship was one of most successful methods that emerged. A mathematics lecturer on one of the college campuses regarded his relationship of trust with his students as the most important method to enhance sound discipline in the lecture room (Oosthuizen et al. 2019):

> If my relationships with students are good they will come to class even if it is hot or raining. Once they are in class they need to know that they will learn something and that they will benefit. (p. 154)

Research on learner misconduct has confirmed that the establishment of a positive relationship between educator and learner would enhance sound learner conduct. A school principal who participated in Nthebe's (2006) research on the management of learner discipline in secondary schools emphasised this as follows:

> Secondary school learners are not kids as we think; we have to build a good relationship and understanding with them. Talk to them and listen to their problems and opinions. By so doing, I think we can have disciplined learners. (p. 73)

Value-driven strategies

One effective approach to prevent or curb ill-discipline amongst learners is to employ an approach to their education based on values generally accepted in that specific school community. Whilst it is acknowledged that different cultural groups and different religious denominations attach different importance to different values, there are a number of generally accepted norms and values.

In his analysis of qualitative data generated amongst five schools that included a wide variety of cultural and ethnic groups, Buys (2015:118) found one prominent theme that emerged namely the lack of value systems in communities as a prominent factor leading to learner misconduct. Under this theme, Buys (2015:133) also revealed that the absence of parents because of socio-economic pressures and alcoholism causes values and norms (including religious values) not to be established at home, leading to behavioural disorders in the community and at school.

Serame (2011:48) found that emphasising values was rated eighth amongst educators on the scale of effectiveness. One specific value-driven strategy, namely, to encourage learner pride amongst the learners, was ranked sixth. Whilst the study did not offer any specific reason for the success of such an approach or give any specific indication of how it should be implemented, it can be stated that inculcating pride in the school context creates a form of positive peer pressure according to which a certain level of disciplined conduct is expected by the learners themselves. Pride can be developed in their own appearance (i.e. clothes and hair), the neatness of the school premises inside the classrooms and on the playgrounds, as well as maintenance of the facilities by not damaging equipment or the school buildings. Once such a type of pride has been established, it can be expected that learners who might have considered breaking the school rules will conform to such standards set by the majority. Buys (2015:133), nevertheless, reports that many learners in schools where a certain level of pride has been established are not positively influenced and still engage in different forms of misconduct.

Serame (2011:73) also found that a strategy of encouraging traditions, which is often also based on values embraced by a specific school community, gained similar support amongst both educators and learners who acted as respondents. Whilst this quantitative study did not offer any collaboration, it is known that schools where strong traditions are maintained experience a positive reaction from the learners because they contribute to pride as a value that can enhance discipline in schools.

Parent-related strategies and methods

The analysed studies without exception refer in their findings to the importance of parents in the complex matter of learner ill-discipline in schools. In 2003, Mentz (as cited in Oosthuizen & Van Staden 2007:359) conducted a survey which showed that the frequencies of learner misconduct are lower in schools with a high level of parental participation in school activities. Two subthemes emerged under this theme during the metasynthesis, namely teacher–parent interaction and parent–teacher–learner interaction.

Teacher–parent interaction

Steyn et al. (as cited in Oosthuizen & Van Staden 2007:364) found that parents play a vital role in their children’s forming of sound attitudes towards positive learner conduct in schools. Similarly, ignorance, indifference, or negativity of parents regarding school matters have a notably negative effect on learners’ attitude towards the school and schoolwork.

According to the research of Wolhuter and Van Staden (2008:389), discussions between the parents of learners and educators were regarded as the most used (92%). In addition, it was rated amongst the top six most effective methods in dealing with learner misconduct. Similarly, Emekako (2015:139) found that 76% of the respondents regarded parental involvement in school affairs as an effective method to enhance sound discipline in a school.

In contrast, Buys (2015) found in his education law study – focusing primarily on parental involvement – that telephone contact between educators and parents creates certain frustrations and proves to be ineffective. Many of the parents are virtually absent from the school environment (Buys 2015):

> *So daai ouers, jy sien hulle nooit* [*sic*]. *Baie keer, die telefoonnommers wat byvoorbeeld by registrasie van die kinders gegee word – as jy die ouers probeer kontak, daai nommers bestaan nie of word nie geantwoord nie. So, die kontak is baie swak.* [You never see those parents. Often, when one wants to contact the parent, the telephone numbers presented at registration, are non-existent. When you try to contact the parents, the call is not answered. So, the contact is poor.] (p. 147; [author's own translation])

Several other research projects also confirmed various approaches relating to parental participation in regulating learner misconduct in schools. Secondary school principals and teacher liaison officers pertinently stated the importance of parental involvement in addressing discipline problems in schools, especially in cases of gangsterism and bullying (Nthebe 2006:95).

Parent–teacher–learner interaction

Serame et al. (2013:69) found that the participating learner respondents regarded triangular meetings and/or discussions between parent(s), teacher(s), learner and even a social worker (sometimes referred to as 'parent–teacher–learner [PTL] conferences') as an effective strategy to curb learner misconduct. The teacher respondents in this survey also regarded it as a 'very effective' method, and it was rated as the fourth-best practice. Similar outcomes are noticeable in the findings of Eloff (2009:206). In the latter study, the learner respondents also regarded meetings with parents as the most effective method, whilst the teachers only ranked it as the sixth-most effective strategy to promote sound learner conduct.

Whereas PTL meetings or conferences can often be extensive and time consuming, Emekako (2016:70) highlighted that meetings between only parent(s), learner and the principal are normally not so time consuming. In some instances, such a meeting would only take place after one or more written warnings have been served to the learner. At the meeting itself, the learner gets the opportunity to state his or her case by telling his or her side of the story in the presence of his or her parents and the principal. In certain instances, if needed, the teacher would join the meeting, sometimes during the last part of thereof. Together they try to solve the problem. An analysis of the quantitative survey amongst educators denoted these kinds of meetings to be 'very effective'. During the qualitative interviews, the participants confirmed that 'it is a very effective' way to deal with learner misconduct but that it is only implemented after repetitive infringements by the learner.

A third type of meeting with parents merely entails a meeting (discussion) between the educator and a learner's parent(s) which, for example, takes place after school. In a survey conducted at historically privileged (former Model C schools) as well as underprivileged public schools (in townships) (Wolhuter & Van Staden 2008:389), a comparison was made between the locality as well as the socio-economic status of respondents regarding the effectiveness of meetings with parents. The results showed an unexpectedly small variation in ranking. Firstly, there was a rather small difference between the responses of learners from former Model C schools and those of learners from township schools. In addition, the rankings of teacher and learner respondents also did not differ significantly. In this regard, meetings with parents were ranked (Oosthuizen et al. 2016:150):

- fourth by teachers in the Southern Region of North West
- second by teachers in the Free State, Eastern Cape and Vaal Triangle

- first by learners from a township in North West
- fourth by teachers from a township in North West.

Discussions or meetings with the parents of unruly students at a TVET college painted a much different picture and were regarded as ineffective. Although it was argued that parents 'know their children on a more personal level', this approach was ranked 11th out of 14 possible best options listed in the questionnaire (Oosthuizen 2018:90). Though this study did not pertinently state the possibility, parental involvement as a method of curbing misconduct may have been ranked low by the lecturers because some learners are already adults, and in many cases, these learners' parents live some distance from the campus.

Conclusion

Various practices, strategies, methods and approaches can be linked to positive discipline as employed worldwide in educational institutions. Against the background of a notable international movement towards positive discipline, South Africa currently lags behind seeing that retributive approaches are still prevalent in many schools. When the best-interests-of-the-child principle – as entrenched in Section 28(2) of the Constitution of 1996 (RSA 1996a) – is firmly and consistently applied in a school setting, teachers tend to adopt a prospective approach by favouring positive disciplinary methods. Positive discipline should, however, not be seen as an unfailing solution for disciplinary challenges but its value lies in the fact that the human dignity of the child is respected, irrespective of the nature or frequency of transgressions.

This metasynthesis revealed that not only proactive strategies – those aiming at preventing ill-discipline and encouraging well-behaved conduct – but also many reactive methods eventually have positive outcomes for the child in mind. It became clear that the moment of applying a certain disciplinary method (before or after the wrongdoing) is not the determining factor. The determining factor for positive discipline is embedded in the intention of the educator – in his or her inclination towards retribution, or a preventative, educationally sound approach that contributes to the security of the child. This orientation is an individual matter: some educators in a school may be inclined towards retribution, whilst others on the same staff, teaching the same learners, may have adopted a positive disciplinary approach.

In essence, the current positive advances in dealing with misconduct differ from earlier approaches which focused on punitive, retributive methods. In America, the early 21st century witnessed a pendulum swing away from a zero-tolerance approach regarding learner misconduct, towards a more lenient approach. In the mid-1990s, the South African former emphasis on a punitive orientation in dealing with learner misconduct gave way to a more positive, human rights approach. For example, Section 4 of the 1988 Regulations Relating to the Control of Pupils, promulgated in terms of the *Education Affairs Act* (RSA 1988), permitted the administration of corporal punishment of learners under certain conditions. After the promulgation of the South African Constitution in 1996 (RSA 1996a), the *South African Schools Act* (RSA 1996b) abolished all forms of corporal punishment in all schools. Moreover, in terms of Section 5 of the said Regulations, much less attention was placed on the application of a due process in the case of a learner's suspensions from school. For instance, in cases of urgency, a principal was permitted (at own discretion) to suspend a learner immediately 'without interviewing the pupil and his parents beforehand'. This approach completely changed after the promulgation of the *South African Schools Act* (RSA 1996b) and the *Promotion of Administrative Justice Act* of 2000 (RSA 2000), affording misbehaving learners a more positive, humane way in the form of fair and just administrative processes.

As can be expected, the individual educator in his or her professional capacity stands central to the disciplinary strategies and methods in the teaching and learning context. This metasynthesis revealed that it is not the school's code of conduct, the overarching disciplinary policy or the level of parental involvement that determines success. Of the highest order in most, if not all, the surveys, are matters related to the teacher as a professional: proper lesson preparation; maintaining a supportive classroom atmosphere; apposite and adequate subject knowledge; high didactic skills level; focusing on the child's holistic development (the ultimate goal of education); and purposefully establishing sound relationships with all learners. Learner respondents who participated in some studies regarded structured discussions between teacher and learner as the best method, which points to the fact that learners are in need of positive interpersonal relationships.

Positive parental involvement plays a vital role in the forming of sound attitudes of their children towards what the school stands for. As an extension of the notion of sound teacher–learner relationships, the participation of parents in discussions between the teacher and their children stand out as an effective approach to reduce learner misconduct.

The reality, though, is that some teachers are not inclined towards positive discipline, as is shown by reports of verbal abuse of learners, or a lax, over-tolerant approach. Both carry elements of a demoralised teacher corps, which should be countered in all ways possible. This synthesis shows the necessity of a value-driven approach which encourages learner pride and creates positive peer pressure towards disciplined conduct. Once a tradition of order and pride has been established, based on generally accepted values of a school community, discipline may become the norm amongst the majority of learners.

Chapter 3

Towards the possible future development of new local ethico-ontoepistemologies of discipline

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Abstract

This chapter takes the form of a position paper. It is argued that, because of the demoralising impact of the Anthropocene as well as the Third and Fourth Industrial Revolutions, our current understanding of the concept of discipline might be

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outdated and that it needs to be re-interrogated and re-interpreted. Taking inspiration from Samostienko's 'humanities-as-technique' as well as Fuller's 'Quantum Epistemology', I propose that the fundamental concept of 'discipline' could be re-enchanted so as to be understood as a manifestation of the curvature of moral and ethical maturity in terms of the three universal, transcendental (Platonic) principles of goodness, truth and beauty. To this end, I employ linguistic etymology, hermeneutic phenomenology and constructive interpretivism to demonstrate how three different etymological traditions could be fused in specific space–time contexts to form a portal of mutual understanding and moral benevolence through which new local ethico-ontoepistemologies of discipline may be allowed to emerge. I suggest that such new ethico-ontoepistemologies can then be employed by teachers and educators as renewable pedagogic resources for continuously learning how we should (and could) live together harmoniously, despite our linguistic and cultural differences.

■ Introduction: Searching for new border zones despite outdated ethico-ontoepistemologies

In this chapter, I suggest that the concept of discipline needs to be re-interrogated, re-contemplated and re-interpreted, mainly because of the demoralising influence of the Anthropocene as well as the Third and Fourth Industrial Revolutions. I deem it to be necessary because there seems to be very little observable uniformity to our current sociocultural topography (Galison 2002) – either in axiological charisma or in ontoepistemological substance (cf. 2020; Geerts & Carstens 2019). Instead, this landscape increasingly demonstrates the emergence of (new) border zones where local actions, beliefs and ethico-ontoepistemologies are continuously being commissioned, coordinated and transacted (Samostienko 2019:473). In this respect, the axiomatic concept of discipline should be no exception.

After briefly pointing out that extant ethico-ontoepistemologies with regard to the concept of discipline are fast becoming outdated, I proceed to draw on Samostienko's 'humanities-as-technique' (Samostienko 2019) as well as Fuller's 'Quantum Epistemology' (Fuller 2020:1, 3) to show, by way of example, how (at least) three different etymological traditions could be fused in specific space–time contexts to form a portal of mutual understanding and moral benevolence through which some new local ethico-ontoepistemologies of discipline may be allowed to emerge. This forms part of the preliminary theoretical and conceptual spadework that I am involved in. I hope to be paving the way for the possible future development of new ethico-ontoepistemologies of discipline that might, eventually, be adapted to all manner of local conditions and contingencies as part of our combined search for new ways of dealing with the often demoralising consequences and dehumanising effects of the Anthropocene (of which global warming and the pervasive, comprehensive impact of coronavirus disease 2019 [COVID-19] are perhaps the best contemporary examples) and the Third and Fourth Industrial Revolutions. It is for these reasons that I have written up this chapter in the form of a position paper. As I am a philosopher of education, I do not pretend to have had access to any empirical research evidence with respect to discipline *per se*, as part of my preparatory work for this particular chapter.

Moreover, as is the case in most of my writings, I have decided, once more, to use linguistic etymology, hermeneutic phenomenology and constructive interpretivism as my primary methodological apparatus in, for and towards this particular chapter. Given my understanding of the goals which I have set with regard to this chapter, I did not want to create the impression that I was some kind of Popperian 'permanent revolutionary' (Fuller 2020:1) or latter-day 'Mr Fixit'. Instead, Fuller’s re-examination of the difference between Kuhn and Popper with respect to the nature of ‘revolutions in science’ (Fuller 2020:1) suggested to me that the Kuhnian role of ‘reluctant revolutionary’ might, perhaps, suit me better. I have therefore decided to concentrate only on the ‘modality’ of discipline in this particular chapter, and then specifically as captured in the following three questions: Does discipline have to be as we understand it now? Does our current understanding of discipline need to continue as it is now? How else may we understand discipline (cf. Fuller 2020:7)?

■ The need for new maps by which to navigate

‘We are like travellers navigating an unknown terrain with the help of old maps, drawn at a different time and in response to different needs’ (Benhabib 2004:6).

Benhabib’s observation above sums up accurately my own assessment of current research on the issue of discipline. After all, we seem to have managed to survive the Third Industrial Revolution – albeit with fluctuating degrees of success – and we are now struggling to come to grips with the many, varied and complex implications of the Fourth Industrial Revolution. This, coupled with the sobering and most disturbing fact that we have crossed the liminal zone of the Anthropocene (refer to discussion below), clearly suggest that we need new, or at least fresh, inventive, pioneering scholarly language to respond to these zeitgeist-related challenges.

The ethico-ontoepistemological map by which most of the current literature with respect to discipline still prefers to navigate has (at least in line with my own, personal understanding thereof) become conceptually neglected and, theoretically speaking, progressively anachronistic. Existing scholarly language seems to be failing gradually to engage with, explore, understand or explain, properly and sensibly, the many manifestations and mutations of the above- and below-mentioned challenges. The capacity of educationists, in particular, to apply scholarly language to respond to current privations in terms of proffering renewed, innovative theorisation seems to me to be all but exhausted. Even some of the most recent scholarly accounts of discipline in education institutions (cf., e.g. Zulu, Oosthuizen & Wolhuter 2019) – although academically forthright and ostensibly dependable – tenaciously reflect elements of outdated reasoning.[13] One explanation seems to be that the language that is used fails (even at the minimum level of proficiency) to accommodate, adequately account for, or adapt to the omnipresent influence of the current zeitgeist of the Anthropocene and the Third and Fourth Industrial Revolutions.

So, mindful of the advice that Ralph Waldo Emerson (25 May 1803 – 27 April 1882), American essayist and poet, gave us – 'Do not go where the path may lead. Go, instead, where there is no path and leave a trail…' (cf. Goodreads n.d.:n.p.) – I decided to consider and adapt Samostienko's theory of 'humanities-as-technique' (Samostienko 2019:473) and to use Fuller's (2020) notion of 'Quantum Epistemology' to help prepare the way for the future establishment of new local ethico-ontoepistemologies with respect to discipline. This chapter attempts, therefore, to represent mainly a watchful etymological preamble to the possible future design, development, assessment and eventual evaluation of 'new images of knowledge and ontological constructions' (Samostienko 2019) of and for discipline.

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[13] In his seminal work quoted in this footnote, Husserl argues that we humans very rarely question the world and the things around us. Instead, we prefer to perceive them as belonging to the category of what is usually '…taken for granted, prior to all scientific thought and all philosophical questioning; that the world is – always in advance as a horizon of what in [any] given case is indubitably valid as existing' (Husserl 1970:110). I would argue that, generally speaking, this continues to be the case.

It is the year 2021. If we were to believe even a very small percentage of all daily current affairs reports, then the future of the world in which we are now living will be determined by the combined and coordinated attempts of all living human beings to engage with, explore, understand and explain the extremely precarious liminality of the Anthropocene as boundary event. This means that humankind might have little option but to navigate this particular void that now lies in front of us with the help of brand-new maps. Such new maps might need to be drawn out of urgent etymological and linguistic necessity at this very instant in space–time and also in the sincere hope that they might assist us to respond timeously and adequately to the many, varied and complex needs that we are now suddenly confronted with.

The Anthropocene, human action and the Third and Fourth Industrial Revolutions

Planet Earth is in a critical condition, and so are its inhabitants. We have entered the Anthropocene, and to do an about-face and simply march back out of it, no longer looks like a feasible option. In 2015, Baker (2015:563, 567) published an article in which she claimed that 'the [A]nthropocene has become the closest thing there is to common shorthand for this turbulent, momentous, unpredictable, hopeless … time – duration and scope still unknown'. More or less a year later, in 2016, Haraway (2016:100) explains this term in typical liminality language: '[the Anthropocene is] a boundary event […] The Anthropocene marks severe discontinuities; what comes after will not be like what came before'. In 2019, Benson (2019:251) explains that the term *Anthropocene* essentially warns[14] us 'that human action has become an important driver – arguably *the* most important driver of change on Earth'. Cooke (2020:1) argues that 'the most fundamental challenge facing humans today is the imminent destruction of the life-generating and life-sustaining ecosystems that constitute the planet Earth'.

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[14] It seems that besides global warming, COVID-19 might be one of the best contemporary examples of the devastating effects of the Anthropocene.

It seems to be for this very reason that Krüger (2018:1–2) triangulates such a disconsolate picture of the adversities that our current world is haemorrhaging from on several levels. He firstly explains the quickened ecological crisis and how it is accentuating the extreme fragility and life-threatening vulnerability of nature. Secondly, he highlights the so-called social dilemma:

- the escalation of populism
- the intensification of neo-nationalism
- increasing attempts worldwide to erode the moral and social justice-related underpinnings of democracy and capitalism
- the growing international allure of a 'post truth' epistemology[15] with all its associated epistemological iniquities (Bufacchi 2020:1; MacKenzie & Bhat 2020:1, 2)
- accelerated moral decay (Potgieter 2019b:37)
- social instability (Krüger 2018:2; Potgieter 2019b:37)
- violence (Potgieter 2019b:37)
- socially unacceptable behaviour such as corruption, state capture, and a collapse of discipline in general and especially in schools and places of higher learning (Potgieter 2019b:37)
- an unceasing rise of in-group versus out-group thinking (Potgieter 2019b:37)
- a continuous re-positioning in (and of) political power relations, territorial and land(-grab) claims (Potgieter 2019b:37)
- global military and anarchist threats (Potgieter 2019b:37; Zieberts 2019).

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15. Bufacchi (2020:1) as well as MacKenzie and Bhat (2020:1, 2) reject '...the received view that post-truth is a new, unprecedented political phenomenon'. All three of them argue (Bufacchi 2020:1; MacKenzie & Bhat 2020:1, 2), instead, '...that truth and post-truth do, in fact, share the same genesis' and that post-truth needs to be distinguished from fake-news, lies, bullshit (the latter is, indeed, an accepted term in contemporary human and social sciences) and other epistemological iniquities.

Thirdly, Krüger (2018:2) refers to the increasingly observable fact that nearly all traditional religious and concomitant value systems (that still seem to form the ethical décor for all current thinking about discipline-related issues) have more or less conclusively lost their authenticity. Not only have traditional faith-based belief systems lost their 'right' to demand moral leadership of society (Potgieter 2019b:37),[16] but they are, according to Krüger, all in crisis. He (Krüger 2018:2) concludes: 'Humanity has entered a new kind of culture, global in spread but shorn of ultimate meaning' (cf. also Potgieter 2019b:37).

In order to re-interrogate, re-contemplate and re-interpret the fundamental concept of discipline, we should recognise and understand the above-mentioned isotropic background radiation of the Anthropocene. The relationship between, for example, the philological and cultural encoding and decoding *of* and ascribing of meaning *to* notions such as 'discipline' and 'disciplined behaviour', which was once relatively easy to explain, has suddenly become complex and confusing in the past four decades or so, amongst others, as a result of not only the existing unescapable rip-currents of the Third and (now, of course, also) Fourth Industrial Revolutions (Schwab 2018) but also because of the rise of human rights cultures (to quote another example) in various countries.

■ ...And then there was change and bewilderment

The Third Industrial Revolution (also referred to as the 'Digital Revolution') was responsible for increased change, unpredictability and confusion in all spheres of life (Cerny 1995). It was also responsible for a high degree of strategic uncertainty and a fast-mutating environment that, for example, made cybernetic and instantaneous ‘border-crossing’ a global reality (Strange 1988). As a direct consequence of recent rapid advances in the field of digital technology, distances between countries have all but disappeared. It is no longer necessary to travel abroad to study there, or to transact business deals. In fact, transnational penetration (Keohane & Nye 1977) has quickly become the new accepted economic and international trading norm. Two cases in point are (1) the Schengen countries in the European Union, and (2) at least some countries in the SADEC region of Africa.

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[16] To argue whether they might ever have possessed this 'right', remains a moot point and falls beyond the thematic nature and scope of this chapter.

Almost overnight, traditional, familiar (and once even considered to be ‘optimal’) understandings of how the world worked and of how we should approach and solve problems have also become passé (Gupta & Banerjee 2003:358, 359). The Digital Revolution – which was brought about by the unrelenting march of an ever-increasing variety of more and more powerful Internet-based, data-centric (and hand-held) computing and communication devices (Potgieter 2008:57–75) – has not only shaken the basic foundations of traditional human wisdom (Gupta & Banerjee 2003:360) but it has also challenged conventional knowledge systems, including the very language that we use to refer to the designs and methodologies that we assume to form the scientific bedrock of such knowledge-related affirmations. It furthermore provided humankind with a multitude of significant, critical and crucial ontological, epistemological, anthropological and even axiological challenges as the phenomenon of the Anthropocene and the work of Krüger (2018) clearly demonstrate. The significance of this last statement becomes even more apparent when we reflect upon it alongside the conclusion made by the futurist, Joubert (2010:211) a decade or so ago. At the time, he maintained that the entire corpus of human knowledge – across all modes of knowing (resp. ‘meaning-making’, meaning-encryption and meaning-decoding) and accumulated since the creation of our universe – is now more or less commonly understood to increase twofold approximately every 18 to 24 months. All available evidence seems to support Joubert’s conclusion: since the late 1990s, the entire world has witnessed a plethora of attempts in practically every conceivable field of scientific enterprise to re-interrogate, re-contemplate and re-interpret scientifically that which were not long ago believed to constitute well-established and incontrovertible knowledge claims.

Against the backdrop of all available present-day digital technologies and their (overall) constructive offshoots and uses, it really is uncomfortable to confess that humankind seems to be finding itself on the verge of destroying the only home we have: planet Earth. Moreover, despite all the 'new images of knowledge and ontological constructions' (Samostienko 2019) that we currently have and gain access to on a daily basis, it becomes increasingly unfathomable that we somehow cannot (or even worse – that we might, in fact, not want to) come up with a globally shared understanding and resultant mutual agreement[17] of how best to check, stop, arrest or at least restrict the nihilistic onslaught of the above-mentioned rolling Anthropocenic entropy. This has acute and very worrying moral and ethical overtones that, in turn, have profound and thought-provoking implications for how we should be thinking about the notion of 'discipline' in future – especially with respect to how all of the above might relate and correspond to our understanding of our own local and community-based contexts and circumstances.

As mentioned above, what we think about discipline and how we choose to act in accordance with such thinking seem to be closely linked to our belief systems (including religion and faith) and their respective moral and ethical reservoirs. It therefore comes as no surprise that recognised fields of scientific endeavour in the human and social sciences – such as organised religion, theology, spirituality and morality (Nuwer 2014) – have not managed to escape the effects of the Anthropocene, or the effects of the Third and Fourth Industrial Revolutions. In fact, even though the majority of people on Earth are now arguably living in the new digital era, one of the puzzling and paradoxical facts of the matter seems to be that more and more religious people are opting in favour of socially isolating behaviour (i.e. they are opting against faith-based corporeal, human association and interaction) precisely because of the increased universal (virtual) connectivity made possible by the digital era (Potgieter 2019a:561).

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[17] The highly contextualised, insulated and idiosyncratic contingency measures which governments and countries across the globe are implementing at present with regard to the spread of (and otherwise dealing with) COVID-19 adequately illustrate this point.

The upsurge in the number of 'e-churches', online faith-based communities and Internet-based spiritual forums, coupled with recent scientific theories dealing with why religion had managed to evolve in the first place, as well as why some people choose to believe in it whilst other people choose to abandon it, all seem to suggest that the effects of digitalisation are compelling scholars to re-interrogate, re-contemplate and re-interpret the place and role of religion, theology, spirituality, morality and ethics in human society. Whilst some philosophers like Svenungsson (2020:1, 2) argue that the last few decades of the 20th century have witnessed a return to religion, there also is compelling scholarly evidence to suggest that there is 'a growing [...] intrinsic cultural and ideological bias that hides at the very core of the category of religion [...]' (Svenungsson 2020:1). This is particularly interesting, especially in light of the latest scientific advances in the fields of extra-terrestrial presence on Earth (Stranges 1996), ancient astronaut theory (AAT)[18] (cf. Comer et al. 2019; Free 2014) and astrobiology (Malone, Drits-Esser & Stark 2014), to name but three examples. These are seriously challenging the basic cultural and ideological bias, as well as characteristic in-group versus out-group obsession inherent to all the major faith-based belief systems and their respective moral and ethical reservoirs across the globe at present. The evidence shows that the three fields of scientific endeavour mentioned above are now operating openly and in a progressively bold and aggressive manner. Vercoutere (2018), for example, bravely avers '[*w*]*eg met de almacht van de kerk … de almacht van de kerk lijk gesloopt te zijn…* [away with the omnipotence of the church … the supremacy of the church appears to be demolished…]'.

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[18] As far back as 1896 already (cf. Charles 1896), but more recently, and at least since 1996, fascinating new (and scientifically corroborated) evidence about, for example, extra-terrestrial visitors to Earth started to be shared among recognised members of the scholarly community. Two of the best-known examples certainly include the case of Valiant Thor (cf. Stranges 1996) and the '*Anunnaki*' [those who from heaven to earth came]. Regarding the latter, in the widely accepted publication edited by Joshua Free, called *Necronomicon Anunnaki Bible*, this particular group of suspected deities, as well as the mythological folklores and writings of the ancient Akkadians, Assyrians, Babylonians and Sumerians in which the Anunnaki regularly appear, are engaged with, explored and explained in light of the most recently available scientific research data. Finally, the results of their airborne LiDAR survey of the Nan Madol World Heritage Site, published by Comer et al. (2019), have suggested that super-intelligent humans or other-worldly beings might, indeed, have been

Integrate and merge, or perish: The Fourth Industrial Revolution

Building on the increasingly all-pervading availability of digital technologies 'that were the result of the Third Industrial, or Digital, Revolution' (Schwab 2018:n.p.), the Fourth Industrial Revolution seems to be largely energised by the fast-advancing integration, interconnection and merging (Chauhuri 2018) of powerful Internet-based, data-centric computing and communication devices.[19] These, as well as other mechanical and digital technologies, are also increasingly being used to equip objects, animals and even people with unique identifiers ('UIDs') that include the ability to transfer data over a network without

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responsible for building these structures more than 20 000 years ago – in other words, in what has been known up till now as the so-called pre-historical age or era. This, and other similar findings, is forcing archaeologists worldwide to reconsider everything they thought they knew and understood about ancient civilizations and the dating thereof. As a sceptic myself, I mention it all here simply to emphasise my point that, because of the Anthropocene and the Third and Fourth Industrial Revolutions, we might have little choice but to start re-interrogating and re-examining absolutely everything that we thought we knew and that we thought we understood.

[19] The comprehensive and global use of computer programmes such as Google-meet, Zoom, Skype, Vidyo and similar programmes to conduct virtual meetings via the Internet in 2020 because of COVID-19 is a prime example in this regard.

requiring human-to-human or human-to-computer interaction (the so-called 'Internet of things') (cf. Brown 2016; Hendricks 2015; Gillis 2019). Such innovations have already started to have a series of even more profound and bewildering effects on global social, political, cultural, education(al), religious, moral, ethical and economic activities, entities, identities and systems than was the case even at the apex of the Third Industrial Revolution (Parliament of the Republic of South Africa 2019).

Change, *per se*, has always been an essential feature of life on Earth. It is not something new, and it was not suddenly introduced to humankind at the onset of either the Third or the Fourth Industrial Revolutions. However, what is arguably new, is the incomparable pace with which the Third and Fourth Industrial Revolutions have been introducing the many and varied changes referred to above. So, even though Krüger (2018) might argue that humanity has entered a new global culture (the Anthropocene) that is essentially trimmed of connotation and denotation – especially with reference to education and discipline – it would seem that the origins and broad nature of the change (including the pace thereof and the language used to describe it) that all hallmark this new global culture, were granted more than enough time and opportunity to incubate (cf., e.g. Cavano 2019; Ngwokabuenui 2015:64; Patty & Johnson 1953:277).

Also, in 2019, the work by Van der Walt and Wolhuter (2019:23–26) confirmed in much the same kind of language as that used by Patty and Johnson, Ngwokabuenui and Cavano, mentioned above what has been observed and reported with respect to learner and student discipline for hundreds of years. According to them, the following eight sets of context-related variables seem to have the most significant impact on learner and student discipline:

- social, environmental–ecological, demographic (migrations and changing population patterns), technological, political, local, regional, national, international and global variables (Van der Walt & Wolhuter 2019:23–26)

- various forms of diversity (culture, religion and linguistic ability) and economics (Van der Walt & Wolhuter 2019:23–26)
- religious pattern shifts (cf. Krüger 2018:2; Van der Walt & Wolhuter 2019:23–26)
- life–conceptual developments and shifts (Van der Walt & Wolhuter 2019:23–26)
- physical facilities (Van der Walt & Wolhuter 2019:23–26)
- rampant individualism (with the possible exception of most African countries and their respective communities – FJP) (Van der Walt & Wolhuter 2019:23–26)
- philosophical shifts (e.g. neoliberalism and neo-managerialism)
- modern transport and social mobility.

In their conclusion, they (Van der Walt & Wolhuter 2019) unfortunately disappoint in that they fail to present us with any new knowledge. The outmoded language that they (Van der Walt & Wolhuter 2019) are using also seems to fall short of capturing the essential features of the current new, Anthropocenic zeitgeist:

> [*The*] problem of (weak) discipline in classrooms should be viewed as a worldwide one, with personal, local and regional dimensions as far as individual classrooms as social spaces are concerned [*and*] …weak discipline could and should be construed as the manifestation of a lack of reciprocal ethics, a failure to express loving care, compassion and moral imagination, and hence as an impediment to education defined as the forming, guiding, leading, equipping and nurturing of the learner as educand. (p. 26)

In light of all of the above, it would seem that humankind's future scientific attempts to engage with, explore, understand and explain a fundamental concept such as 'discipline' might depend even more heavily than ever before on our combined scholarly ability to comprehend the archetypal configuration between (1) the language that we happen to have at our disposal in any particular space–time context with which to intra- and intercommunicate, (2) the kind of fresh, inventive, pioneering scholarly language that might, *de facto*, be needed in a new space–time context, (3) 'Being' as ontic essence, ethical and moral propulsion and epistemic actuality, and (4) the particular phenomenon (in this case, 'discipline') that we wish to study. It is to this archetypal configuration that I now turn for the remainder of my argument in this chapter in favour of 'new images of knowledge and ontological constructions' (Samostienko 2019) of and for discipline.

Language, Being and discipline

In qualitative research, it is commonly accepted that the activity of naming, labelling or denoting constitutes one of the first steps in any kind of phenomenological inquiry. Scientifically speaking, it might, under specific circumstances and in particular contexts, be considered as a reasonably pointless exercise for a researcher to try and study any phenomenon without knowing first what it really is that he or she wishes to investigate. The same applies to the concept, idea or notion of 'discipline'. In education, in particular, we should be cautious of attempts to theorise about discipline before we have reached some kind of consensus amongst ourselves as members of the scholarly community on how we should proceed in as far as naming, labelling and denoting this concept, idea or notion is concerned. After all, the German philosopher Martin Heidegger (1978:217) reminds us that 'language is the house of Being. In its home man dwells', and the American theologian Hendricks (2018:38) affirms the fact that 'language is the apparel in which your thoughts parade before others'. What this essentially means is that we not only live *with* and *in* the language that we use on a daily basis to communicate with each other but that we also live *through* it. We are fundamentally allowed to live our lives in as far as our lives are, in fact, determined by the very language that we use. It furthermore implies that, because we are human beings, we can only claim that we are, in fact, reflective human beings insofar as we succeed in understanding Being in terms of human language and, hopefully coming full circle, offering our language-based interpretation thereof back to Being when we think that we might finally be understanding something.

So, if we truly desire to understand the ontic features of a phenomenon such as ‘discipline’, we need to be honest about the fact that we really only have language to assist us in our attempts to do so. This does, however, make it difficult for even the most gifted scientific minds amongst us to capture the ontic features of anything by using nothing but the interrogative and interpretive limits of human language. Even a cursory study of the etymology of ‘discipline’ confirms the often-quoted statement made in 1 Corinthians 13:12 in the New Testament of the Christian Holy book, the Bible, namely, ‘βλέπομεν γὰρ ἄρτι δι’ ἐσόπτρου ἐν αἰνίγματι’ [‘What we see now is like a dim image in a mirror’]. Gadamer ([1960] 1997), the German philosopher of the continental tradition, argued that every single word that we can ever think of using is invariably weighed down right from the start by its own elaborate set of semantic grids that are, in any case, always contextualised in space–time, thus making it particularly challenging to isolate the exact semantic value of such a word, term, notion or construct. In addition, the meaning that academic authors try to convey is more often than not contaminated by their own sets of *a priori* and scientifically induced assumptions, beliefs and values, which render the interpretations and explanations that they might offer to be always contextualised, tentative and partial. I trust that a brief explanation of the following three (of many) available linguistic traditions that deal with the term ‘discipline’ might help to substantiate this point, namely the (1) Proto-Indo-European (PIE), (2) Semitic and (3) Germanic linguistic traditions. I hope to demonstrate that these examples might serve, at the very least, as a starting point from where we could contemplate, as Kuhnian ‘reluctant revolutionaries’ (Fuller 2020:1) the development of new local ethico-ontoepistemologies of the construct of ‘discipline’.

Example one: From the Proto-Indo-European languages

Etymology suggests that in PIE, for example, the term ‘discipline’ is inextricably intertwined with the three universal, transcendental (also referred to as 'Platonic') principles of goodness, truth and beauty (Gauger 2019:n.p.; Hickman 2018:1–3; Plato 1975:Book X, s. 907). It is believed to have arrived in English via Middle English (in the sense of self-chastisement towards the perfection of moral character[20]) from Old French and eventually from the Latinate verb stem *disco*, which means 'to learn'. It furthermore derives from the Latin noun *disciplina* (again via Old French, eventually into English), which denotes both the teaching and learning of, specifically, processed information (i.e. sensible knowledge). It also derives from the Latin noun *discipulus* which refers to learner or student. Originally, it referred to 'disciple' (in the sense of 'a devoted follower of a/the prophet or acclaimed teacher').

In Greek, the notion of *discipline* is almost always closely related to the concept of μαθητής (*mathētēs*) which refers to any 'student', 'learner', 'trainee', 'novice' or 'educand' as opposed to a 'teacher'. In the ancient world, it was most often associated with people who were devoted and voluntary followers-as-students of a great religious leader, spiritual teacher or mystic thinker such as, for example, John the Baptist, Jesus the Christ, Buddha or Siddhattha Gotama (also known as Siddhārtha Gautama), Danté the poet, Guru Nanak, Mirzā Ghulām Ahmad, the prophet Mohamed and many others. A careful analysis of the Latinate verb stem *disco* [to learn] and its close association with the above-mentioned Greek concept of μαθητής (*mathētēs*) suggest that discipline, in these languages, denotes not only an agreeably open-minded *modus vivendi* attitude but also a noticeable degree of freedom of choice on the part of the 'student', 'learner', 'trainee', 'novice' or 'educand'. He or she has the right to decide for him- or herself (and this, I think, is meaningful) whose moral leadership is worth following. He or she also has the right to decide for him- or herself which dogmatic principles might be considered as dependable moral and ethical signposts on his or her way towards moral perfection in terms of living a life of goodness, truth and beauty – that is, a life (eventually) committed to the development of 'a redemptive, deliberative, state-building, just and righteous society that might, eventually, be filled with and run by citizens with integrity' (Van der Walt & Potgieter 2011:82).

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[20] See https://www.merriam-webster.com/dictionary/discipline.

In light of Van der Walt and Potgieter's work quoted above, it seems particularly useful and informative to study also the following explanation of the Greek verb stem *didaskoo* ('teaching') offered by Wegenast in the 1986 version of Colin Brown's (1986) encyclopaedic work *The New International Dictionary of New Testament Theology*:

> [*D*]idasko can be said to denote the activity of a teacher, whose concern is to develop his pupil's abilities and to impart knowledge and skills. …But in its LXX[21] usage (as opposed to that of profane Gk.) the word does not primarily denote the communication of knowledge and skills, but means chiefly instruction [*i.e. didaskein*] in how to live […]. (p. 760)

According to Wegenast (cf. Brown 1986), the same applies in the case of the synoptic gospels. He maintains:

> [*O*]ur investigations have therefore shown that the Synoptics' use of *didasko* is similar in form to that of the LXX […]: it does not convey the idea of developing a person's abilities, but rather of instructing him in how to live; it also involves addressing him personally […]. (p. 763)

Again, the kind of teaching and learning that is implied here, was always geared towards the continued striving for moral perfection in terms of living a life of goodness, truth and beauty/refinement/grace aimed, eventually, at reasonable, dignified citizenship. It seems, therefore, that in Greek, discipline:

- is inextricably linked to *didasko*
- *didasko* is always aimed at attaining *paideia*

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[21] Here, 'LXX' refers to the Septuagint ('the earliest extant Greek translation of the Old Testament from the original Hebrew' [cf.Britannica n.d.:n.p.]).

- *paideia* (παιδεία) (meaning 'the full-blown completeness of the soul') (cf. Kazamias pers. comm., 28 May 2013; Potgieter 2015:66) can only be reached via a continuous, disciplined pursuance of the transcendental principles of goodness, truth and beauty (Hickman 2018:2).

From the above, we can conclude that, in the same way in which gravity can be understood as a manifestation of the curvature of space–time, the fundamental concept of 'discipline' can be understood to be a manifestation of the curvature of moral and ethical maturity in terms of the three universal, transcendental principles of goodness, truth and beauty. This allows education to offer safe and secure meeting spaces – in dedicated, contextualised, safe and protected space–time havens – for teacher-educators and their learners/students alike, where freedom, democracy and solidarity can be practised and where the value of, for example, mutual respect, understanding and social justice can be openly debated, critiqued and promoted.

Example two: From the Semitic languages

In Hebrew, as representative of the Semitic languages, the masculine noun מוּסָר (*mûwçâr*) usually denotes the concept of 'discipline'. Besides referring to subjecting oneself willingly and freely to verbal teachings with respect to how one should live one's life (usually in accordance with the will of God), it also denotes the semantic value of honest, authentic, rules-based dialogue between people for the purpose of obtaining wise council, justice, understanding and equity (cf. Strong 2020:n.p.). This particular noun has, however, been derived from the Hebrew primary (verb) root יָסַר (*yâçar*), of which the semantic value refers to (double-) checking, deliberate instruction with respect to a particular doctrine, bonding (as between a teacher or educator and the educand), arguing, deciding, judging, reasoning together, warning and even correction (cf. P. Booij pers. comm., 18 June 2017; Strong 2020:n.p.).

What is particularly interesting in this regard is the fact that both יָסַר (*yâçar*) and מוּסָר (*mûwçâr*) are often used in Hebrew along the same semantic grids as the verbs שְׁמַע (*shema*) and למד (*lemad*) (cf. Hendricks 2018:53, 54; Wilkinson 2018:2, 3). The first verb stem, namely שְׁמַע (*shema*) – meaning 'to listen', or '(to) obey' – actually forms part of the well-known Jewish imperative שְׁמַע יִשְׂרָאֵל, meaning 'Sh'ma Yisrael', or 'Hear, O Israel'. These words are always used in a semantic environment of wanting to teach a person or group so that he or she or they may learn and, as such, these words may only be expressed by a person or institution with the officially conferred and entrusted power (primarily by Jehovah or Yahweh himself) of 'having the say' in the Jewish community, such as the Priest. This is why authentic listening and truthful obedience can only be realistically assessed in Hebrew, by scrutinising one's actions: if one really listens to the one with the officially conferred and entrusted power of 'having the say', one will automatically 'do' (as one has been taught or instructed to do). By truly listening, one will, furthermore, automatically search for the best possible way of living one's life so that one may not only hear the truth but eventually also do what is regarded as 'good'. If one did not 'do', then obviously one did not 'listen for the truth or search for the best possible way of living one's life', and that means that one did not 'obey' (cf. Van Niekerk 1991, 1994:55–61; as well as, for example, the Hebrew text in Jr 11:6–7 and Jr 23:21, 22). The implication is that, if one's actions do not reflect accurately what one has been taught, then one has, in fact, never been taught and, therefore, there can be no evidence of living a disciplined life of goodness, truth and beauty[22] (see also Hendricks 2018:39–43; Wilkinson 2018:8, 9).

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[22] In Hebrew, a disciplined life will, in and of itself, reflect clear, observable evidence of having been truthfully instructed in how to live by specifically searching for the best possible way, listening for the truth and then doing what is good, truthful and beautiful/graceful/purposeful – that is, living in accordance with the three universal, transcendental (resp. Platonic) principles of Goodness, Truth, and Beauty (cf. Gauger 2019; Hickman 2018). This is what discipline (מוּסָר; *mûwçâr*) ultimately is about.

It is in this regard that the verb stem למד (*lemad*) – meaning both ‘to teach’ and ‘to learn’ – reveals such a noticeable semantic connection with יָסַר (*yâçar*) and מוּסָר (*mûwçâr*). In Hebrew, the action that might be indicated by a particular verb stem is always expressed with specific reference to one of seven possible *binyanim* (i.e. verb families). The second of these *binyanim* is called the ‘Piel stem’ of the verb. It is in this verb family that the verb stem למד (*lemad*) – meaning both ‘to teach’ and ‘to learn’ – is located as it appears in, for example, the Torah in Deuteronomy 4:1 (‘to teach’) and Deuteronomy 5:1 (‘to learn’). In this particular *binyan*, which is used to denote intensive action in an active voice, למד (*lemad*) usually signifies the following four well-defined linguistic actions, namely (cf. Wilkinson 2018:2, 3):

- to busy oneself eagerly with the action indicated by the verb stem
- to pursue a particular course of action enthusiastically
- to urge someone to act upon a specific set of teachings or instructions
- to cause someone/others to ‘do’ (i.e. ‘to act’) the same.

From the above, the fundamental semantic link that exists in Hebrew between (1) discipline, (2) listening and obedience and (3) teaching and learning becomes obvious: if the educand is, for whatever reason, unable to demonstrate his or her willingness to live the disciplined life of an organic, whole, noble, ‘ideal member of the polis’ (Potgieter 2015:64) – that is, as a person with *paideia* (Gr. παιδεία) (i.e. ‘full-blown completeness of the soul’ [Potgieter 2015:66] – and therefore as someone with integrity, who will be an asset to his or her community), then whosoever might have been entrusted with the task of teaching him or her in respect of *paideia* of the soul simply did not teach. In Hebrew, the implication seems very clear: if the educand did not learn, the teacher never caused the educand to learn; and if the teacher, therefore, effectively did not teach, then what has he or she been doing?

Example three: From the Germanic languages

All of the above-mentioned observations seem to be relevant especially when compared with the meaning of 'discipline' in, for example, the Germanic languages. As demonstrated above (and again below), it would seem that discipline-related (moral and ethical) choices and conduct might not only be bound *by* and also *to* very particular linguistic traditions, customs, rules and conditions, but that such discipline-related (moral and ethical) choices and conduct might, in turn, serve to reinforce particular linguistic traditions, customs, rules and conditions.

In German, the substantive noun *disziplin* reflects at least two distinct grids of encoded semantic value, namely, (1) the observance (by an individual) of specific (and also prescribed) rules of conduct, and (2) the initiation and eventual insertion of an individual – provided that such an individual voluntarily, wilfully and knowingly surrenders to the authority of the group or community – into the order of a group or a community. Over the years, the semantic value of the concept, idea or notion of 'discipline' has, not only in German itself but also in other Germanic languages, undergone subtle theoretical and conceptual changes away from the original (and markedly more communally liberal) Latin and Greek meanings mentioned in the previous paragraphs. In Afrikaans (one of several Germanic languages), for example, the (very much culturally entrenched) synonym for punitive or corrective discipline, namely 'tug', is derived from the Dutch (another Germanic language) verb stem '*tiegen*' and the German verb stem '*ziehen*', which means 'to pull' or 'to 'draw'. What is noteworthy in this regard is the fact that this very specific intervening, punitive and conservative-corrective notion of discipline (German: '*ziehen*'; Dutch: '*tiegen*'; Afrikaans: '*trek*') is nearly always used in most of the Germanic languages together with, or at least along the same syntactic and semantic grid, as the equally traditionalist term 'authority' (German: '*die Behörde*'; Dutch: '*gezag*'; Afrikaans: '*gesag*'), as indicated above. In these languages, the term 'authority' has more or less the same semantic value as the infinitive English verb ‘to say’ (Dutch: ‘*zeg/gen*’; Afrikaans: ‘*sê’/om te sê*’). In semantic environments that have to do with discipline, it refers primarily to a person or institution with the officially conferred and entrusted power of ‘having the say’, and in this regard, it seems to resonate clearly with the link that exists in Hebrew between (1) discipline, (2) listening and obedience, and (3) teaching and learning, as explained above.

There is, however, a linguistic as well as an axiological proviso. This proviso determines that such entrusted power of ‘having the say’ should be strictly limited to and sharply focused on a particular community-as-collective’s understanding of those norms, values and demands of propriety that are believed to instruct, assist and otherwise accompany a person in the best possible way in ‘how to live’; that is, in how to best cultivate his or her mind (development of intellectual character) and how to best cultivate his or her soul (psyche) (development of moral and aesthetic character: the so-called *paideia*[23] of the soul). The proviso further seems to imply that all entrusted power of ‘having the say’ should be channelled towards the pedagogic accompaniment of the educand towards self-actualisation as a fully integrated and independent citizen who will be able to serve his or her community according to that community’s most profound convictions of what might constitute goodness, truth and beauty.

This means that someone who is in a position of authority automatically has more than just a ‘voice’. He or she has, in fact, the ‘say’ – that is, the final discretion – in and relating to all matters under his or her authority, provided that they specifically relate to those norms, values and demands of propriety that a particular community-as-collective might argue to be non-negotiable (Swanepoel 1978:103, 104). This notion of ‘having the say’/‘final discretion’ is pedagogically embedded even deeper in German. In this language, it is derived from the Low and Middle Low

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[23] In Greek, *paideia* usually refers to the purposeful educative advancement of the educand towards a life of Goodness, Truth and Beauty (Merriam-Webster 2020:n.d.).

German verb *behören* (meaning ‘to belong’) which, in High German, is usually used as *gehören* in colloquial speech. It strongly supports the notion that a person firstly belongs to those norms, values and demands of propriety that his or her chosen community-as-collective might argue to be non-negotiable. Then, and only then, does a person belong to those members of his or her community-as-collective who have bestowed on him or her the authority to speak on their behalf.

I believe that all of this is highly significant for any scholarly attempt at designing, developing, assessing and eventual evaluating ‘new images of knowledge and ontological constructions’ (Samostienko 2019) of and for discipline, not only because it clearly corroborates Heidegger’s (1978:217) observation that ‘[…] language is the house of Being … [i]n its home man dwells’ but also because it confirms that we are, indeed, fundamentally allowed to live our lives in as far as our lives are, in fact, determined by the very language that we use. It can, therefore, be no coincidence that the notions of ‘authority’, ‘belonging’ and ‘discipline’, in Low and Middle Low German, are commonly understood as being semantically mutually interdependent. I argue that it is precisely because of the essentially ontic relationship between language and Being that these notions can be thought of as being linguistically restricted to what Beckmann (2019) refers to as:

> [*S*]yntactic environments that endeavour to transmit the notion that a person or institution cannot claim to have any authority, unless they can prove that they have deliberately been called upon by the collective of all those to whom they happen to belong, to [*exercise such conferred authority on*] those who [*might be in*] need [*of*] their particular knowledge, skills and social attributes […]. (p. S3)

This implies that any person or institution who has been endowed with the ‘say’-ing power of authority is temporarily worthy of that station only by virtue of (Beckmann 2019):

> [*T*]he communal and collective nature of the social contract that is at play here: those who happen to have the authority, remain accountable to the collective who entrusted them with such authority. (p. S3)

This suggests that, in the Germanic languages, all authority (and, therefore, also all consequent disciplinary-related actions) are simultaneously always both the purpose and the outcome of a greater, yet very specific collective, communal demand. More specifically, as far as the notions of '*ziehen*', '*tiegen*', '*tug*' (on the one hand) and authority as speaking on behalf of an entrusting community-as-collective (on the other) are concerned, the term 'discipline' in the Germanic languages seems to refer (in somewhat stark contrast to PIE languages) very specifically to the teacher-educator or parent/caregiver who conservatively leads, draws and (sometimes by way of deliberate intervention) pulls[24] the educand towards proper, authentic adulthood at the hand of specific (and also prescribed) codes and rules of conduct and for the purpose of the measured initiation and eventual insertion of an individual (who is willing to surrender to the authority of the group or community) into the moral and ethical order of a particular group or community. The educand who is being educated in this manner is thus progressively and continually drawn towards what seems to be a particularly contingent kind of normativeness:

- of being disciplined and able to live an autonomous, orderly life of demonstrable goodness – provided that the educand's behaviour reflects, as closely and intently as possible, that of the particular community as moral and ethical collective
- of voluntary obedience to truthful authority – provided that the educand understands that this implies strict obedience to the particular community as moral and ethical collective to which the educand happens to belong
- as acceptance and understanding of freedom-in-responsibility – and, once again, provided that the educand practises his or her freedom by continuously answering to the very specific moral and ethical code of behavioural beauty and grace prescribed by his or her community-as-collective.

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[24] In this sense, it means to 'pull' (as in exerting a directive force of predetermined magnitude) through purposeful educative intervention.

Discipline, especially in the Germanic languages, also implies behavioural restraint by means of positive intervention and continuous educative guidance (by figures and institutions of authority). It does so by unremittingly indicating to the educand what the group or community-as-collective regards as the so-called 'correct way' and by continuously ensuring that the educand adheres to what a particular community-as-collective might believe to be the professed correct and reasonable way, namely the way that leads to virtuous perspective and deepening of understanding, albeit according to the very specific moral and ethical principles of that particular community-as-collective to which the educand happens to belong (cf. Potgieter 1980:72, 73; Swanepoel 1978:104). This clearly stands in pronounced contrast with the agreeably open-minded *modus vivendi* attitude with which discipline-related behaviour is associated and tolerated in, specifically, PIE languages.

■ Goodness, truth and beauty; yet humans remain carriers of difference

The examples which I have discussed above from the perspective of three different linguistic traditions (i.e. PIE, Semitic and Germanic) have important implications for the attempt in this chapter to suggest a cautious preamble to the possible design, development, assessment and eventual evaluation of 'new images of knowledge and ontological constructions' (Samostienko 2019:n.p.) of discipline in education institutions such as schools and universities. On the one hand, we do not really have any option but to do battle with the Anthropocene and Krüger's disconsolate picture of the three greatest adversities from which our current world is haemorrhaging on a macro-level – all of which are, of course, conclusively integrated with the effects of the Third and Fourth Industrial Revolutions. What is ominous in this regard is that none of these exceedingly dangerous and potentially life-threatening conditions seems to care – in and of themselves – for the subtle linguistic, cultural or other differences that might happen to exist between people as we try to make sense of, for example, discipline and how our understanding thereof might impact on understanding of ourselves, changes in our lifeworld, our future educational endeavours or, indeed, our own, contextualised life situations. On the other hand, precisely because we do not only live *in* the language that we use on a daily basis to communicate with each other, but because we also live *through* it, our continued behaviour as owners of difference (Visker 1996) has mutated over the years into the belief that local, contextualised differences (also with respect to new local ethico-ontoepistemologies of discipline) are, in fact, part and parcel of human rights. However, Visker (1996) warns us in no uncertain terms that this might lead to increasing conflict and polarisation between people instead of uniting us[25] in our engagement with and exploration, understanding and eventual explanation of, for example, the Anthropocene and the effects of the Third and Fourth Industrial Revolutions (Visker 1996):

> *Als de ontwikkeling doorgaat dat het verschil telkens wordt gezien als het recht op verschil, impliceert dit dat heel de intersubjectieve sfeer tussen mensen wordt opgevat als een conflict tussen rechten. Wanneer verschillen met elkaar in wrijving komen, zullen de dragers ervan deze formuleren als een conflict tussen hun recht op verschil en de ander zijn recht op verschil. Indien we die logica doortrekken wordt de hele samenleving gepolitiseerd. Steeds als mensen samen zijn is er een bron van conflicten tussen rechten. Die moeten bijgelegd worden, dus moet er een soort interventiemacht zijn.* [If this development, namely that difference should in all instances be viewed as the right to differ, is allowed to take root, the implication would be that the entire intersubjective sphere between people would be filled by a conflict of (between) rights. When friction between differences is allowed to develop, chances are that the carriers of such differences would explain this friction as a conflict between their right to differ and the other's right also to differ. Should we then pursue this line of thinking to its logical conclusion, then society at large becomes politicised. Whenever people find themselves together in a group, there would always be a source of conflict between rights. This needs

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[25] Refer also footnotes 4 and 5.

> to be reconciled and that is the reason why there should be some sort of intervention force.]. (p. xx; [author's own translation])

As a result, discipline (pedagogically speaking) refers today mainly to the student or educand's voluntary acceptance of the influence and teaching(s) of the normed adult teacher-educator and the student or educand's personal, learnt appropriation of the knowledge, dispositions and ideals of the teacher-educator, as well as of the parent or legal caregiver. The term 'discipline', furthermore, denotes design and order (as structured beauty), dependable, truthful governance and the maintenance of stability so that a particular activity or a specific piece of work not only can continue smoothly but can also show progress (in terms of goodness-of/for-purpose) in order to reach the desired aim (Swanepoel 1978). It is also commonly understood that the term 'discipline' connotes not only external discipline but also a personal or inner discipline prompted by the spiritual acceptance of a disciplined life by educands themselves.

It seems, therefore, that Rudi Visker (1996) might have been correct all along. As long as there are human beings on the Earth, we will continue to behave as 'owners of difference'. Moreover, such differences will keep on resonating in and reflecting through the very fabric of the languages that we choose to employ in our attempts to justify the grounds for our understanding of who we are (i.e. our 'Being' with a capital 'B') and how we should go about ensuring that our progeny will also behave in accordance with our exploration, understanding and explanation of the ground(s) for a continuous, disciplined life of goodness, truth and beauty.

Discipline has, especially since the time of the enlightenment, also been closely related to the 'production' of disciplined and informed minds (Hamilton 1983:107). As such, discipline has been forming an integral part of the well-established and common understanding that education does not only provide opportunities for the development and emancipation of the individual; it also provides opportunities for the continuous development and emancipation of the collective to whom the individual happens to belong. As such, it can be understood as a renewable pedagogic resource for continuously gaining knowledge and as a springboard for learning how we should (and could) live together harmoniously, even despite our linguistic and cultural differences (E. Klerides pers. comm., 30 October 2019).

■ Conclusion

Human life is a journey that is made up of an ensemble of a wide variety of life situations that are continually being created for us, including those that we create for ourselves – all within the range of an infinite number of possibilities and limitations. The very best that we as educators can therefore do, is to teach and accompany every new generation of educands so that they may try their utmost best to live lives that will aspire to the highest possible archetypal codes of sense and sensibility, namely:

- ethical sense-making, meaning-making, meaning-encryption and meaning-decoding (i.e. purposeful Goodness that can be operationalised in localised space–time contexts in the form of operative, durable, efficient and productive behaviour)
- authentic sense-making, meaning-making, meaning-encryption and meaning-decoding (i.e. verifiable Truth[fullness] that can be operationalised in considerate and compassionate love, joy[ousness], bliss and peace)
- aesthetic sense-making, meaning-making, meaning-encryption and meaning-decoding (i.e. untainted, pure beauty that can be operationalised in mindful and caring wisdom, knowledge and skills).

Because this chapter takes the form of a watchful, introductory position paper, it was never my intention to provide the reader with detailed strategies of how a re-enchanted ethico-ontoepistemology of discipline, based on a re-interpretation of the three universal, transcendental (Platonic) principles of goodness, truth and beauty, could be developed and employed as a pedagogical device in schools and classrooms across the globe and across all cultures and belief systems. I have, nevertheless, decided to conclude this chapter by offering the following practical examples of how these new understandings and approaches to discipline could be introduced into schools and classrooms across the globe and across belief systems.

Educands could, for example, be requested by their teacher-educators to narrate and/or author stories about events where they believe they have personally experienced goodness, truth and beauty (or a combination thereof); where everything seemed to align into a perfect moment of happiness, bliss and peace. As a pedagogical tool of inspiring responsible action, teacher-educators may also request educands to narrate and/or author stories about what they believe would be an ideal future (life or situation) based upon the three universal, transcendental (Platonic) principles of goodness, truth and beauty. What could help them progress in order to achieve this particular goal? What could prevent them from becoming their best possible self (internal and external factors)? They can also be encouraged to talk or write about a factually accurate (or imagined) story where a particular individual's life appeared to be perfectly good, truthful and beautiful but, because of an unfortunate turn of events, it became increasingly disordered and unmanageable. What could the human character do in order to rise up again in cases where goodness, truth and beauty might have gone awry? Alternatively, educands could also be requested to consider what the human character can, may and should consider doing in order to survive in cases where his/her search for goodness, truth and beauty might become ethically difficult and morally challenged (cf. Braun 2020:95).

The above-mentioned examples illustrate that the empathetic-reflective and confessional-narrative pedagogic approach which

I am proffering here might prove to be a useful pedagogical device as it has the potential of relating all kinds of confessions and narratives to the educands' personal (and inherently truthful) histories. It can also help to pursue goodness through the continuous design and re-design of secure, safe and trustworthy space–time contexts that have the potential of offering the educand the privilege of an *eigentliche existenz* (Eng. 'ultimate existence') that might eventually prove to be eternally beautiful, refined and graceful. It can also promote a culture of 'honest, committed participation and authentic communication' in the classroom whilst inspiring authentic, truthful behaviour (cf. Braun 2020:95, 96).

The pedagogic significance of the aforementioned examples seems to be that these exercises not only address the ultimate goal of education in descriptive terms (i.e. individual and cultural responsibility), but that they also address the personal experience of finding purpose and sensing, encoding and decoding fullness of meaning whilst we are engaged in our respective individual journeys towards our *eigentliche existenz* of goodness, truth and beauty.

It speaks for itself that the proposed pedagogic obligation that is of essence here, is arguably one for life. This implies that most teacher-educators might only be able to provide a few signposts to help capture and build on moments of experienced and shared goodness, truth and beauty so that their educands can be inspired to initiate or continue their own, individual journeys to their desired futures of goodness, truth and beauty, where they can get a sense of fulfilling their own, personal potential and destinies. The journey itself can nevertheless only be undertaken by the individual character of each and every educand and the educator should be satisfied by being no more than a helpful, paracletic companion in the educand's process of continued sense-making, meaning-making, meaning-encryption and meaning-decoding (cf. Braun 2020:96).

Living such a life would be the decisive paragon of *disciplina*, *paideia*, *mûwçâr* and *disziplin*. It would be active proof of lived discipline, guided by *didaskoo*, *yâwçâr*, *shema*, *lemad*, *tiegen*, *behören* and *gehören*, yet authentically filtered through and blended by local ethico-ontoepistemological encryption and decoding, without denying, diluting or shunning the pervasive universal applicability of the three transcendental principles of goodness, truth and beauty.

Chapter 4

Social factors influencing national certificate vocational student persistence, retention and early departure

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Abstract

Student dropout is not an insignificant problem. Early departure not only negatively affects educational institutions' success but also influences the personal, economic and employment well-being of individual learners, causing rippling financial effects in society and government. Early departure, furthermore, tends to not be a singular decision. It is the result of a combination of individual and social processes, including challenges related to student discipline. Based on an analysis of pertinent theoretical constructs, this chapter provides an overview of the works of Vincent Tinto and John Bean as contributions to the better understanding of student attrition, retention and persistence. An analysis of the findings from three National Certificate Vocational (NCV) programmes offered by TVET colleges in the Western Cape province is also offered. This research, following Tinto and Bean, like most of the work that focuses on an alternative approach to student behaviour, is located within the critical research paradigm.

Introduction

Students with varied backgrounds and academic abilities access and enrol in post-school institutions, resulting in different skills and success potential (Laskey & Hetzel 2011:31). Student background has the potential to socially marginalise some, leading to negative characteristics or behaviour ranging from inadequate class attendance, to inappropriate behaviour and early programme departure. According to Bean and Eaton (2001:73), student participation in post-school education is voluntary and serves as an influential catalyst for their retention and programme completion intention. Voluntary participation is influenced by a number of individual factors – such as academic ability, motivation, attitude and physical energy level – as well as by social factors, such as community, home life and resources available to students.

In the mid-1970s, Astin (1975:30) critiqued what he calls the 'traditional approach' to student failure – an approach that linked failure to students' ability. Astin (as cited in Lenning, Beal & Sauer 1980:4) argued that student behaviour is complex and a result of a number of factors. Astin's (1985) theory of student involvement analysed positive student development through institutional involvement aimed at achieving education institutions' desired outcome (Campbell 2012:16). Factors he noted as 'influencing student performance' include demographics and background as well as college experience (Gaffoor 2019:28).

Tinto proposed a retention theory (1987) that argued against focusing on individual student characters as causal factor in student failure (Laskey & Hetzel 2011:34) and focused on social integration influences within the institution of education and training. At the same time, Bean (1981) developed a model that focused on external social and support factors that positively influence student behaviour, such as their own decision-making. The discourse on student persistence and retention, influenced by social factors – dominated by the work of Bean (1981) and Tinto (1987) – provides a thought-provoking view on the behaviour of marginalised students, behaviour Ishanti (2003:443) calls 'attrition behaviour'.

Problem statement

Student dropout is not an insignificant problem. Van Zyl (2015) notes that '[m]ore than half of the students that will drop out of higher education institutions countrywide will do so during their first year'. Low levels of student retention and programme completion negatively affect institutional success and financial stability (Adamson & McAleavy 2000:535; Allen 2012:8) and also influence the personal, economic and employment well-being of individual learners as well as the financial health of government and intellectual capacity of society (Grebennikov & Shah 2012:224; International Labour Organization 2014:73). Furthermore, the effect of low retention rates not only tarnishes the reputation of educational institutions but also lowers the progress, confidence (Brunsden et al. 2000) and self-belief of job applicants with part-qualifications below minimum job requirement, and can also influence parenting skills and increases the likelihood of criminal activity.

Student dropout is not a singular action. It is the result of academic disappointment if the 'traditional' approach is accepted or the result of inappropriate integration or insufficient support, if Tinto's or Bean's arguments are accepted.

Aim

The aim of this chapter is to present social factors that holistically influence NCV student decision-making and behaviour, specifically focusing on their programme persistence, retention and early departure. Identifying these social factors provides TVET colleges with a platform from which to explore and address behavioural and discipline challenges displayed by students who are socially marginalised and most likely to depart early and become attrition statistics (i.e. 'attrition behaviour').

Theoretical framework

Social factors that influence student attrition behaviour are not directly linked to the teaching and learning process but they negatively influence success. The study of student attrition is dominated by the work of Tinto, particularly his student integration model. Tinto (1987) argued against focusing on the individual as an attrition factor, claiming that it is a mechanism used by educational institutions to deny responsibility for the lack of student success (Laskey & Hetzel 2011:34). Tinto (1975) took the concept of academic and social integration from Spady's critique of Durkheim. Spady (1971) noted Durkheim's (1951) conclusion that individuals commit suicide if they lack values of a social system and are not supported (Bean & Eaton 2001:74). According to Durkheim, a correlation exists between student suicide and dropping out, as both involve exiting a social system. Tinto (1993, 1997) argued that the relationship between student commitment to the academic process and an institution's commitment to the student influence attrition intention and is, therefore, a predictor of student success (Schreiber, Luescher-Mamashela & Moja 2014:6).

Tinto acknowledges the unique characteristics with which students enter institutions, the unique structure of educational institutions, and the dual responsibility students and educational institutions has and contributes to the social setting towards retention and persistence. He categorises the origin of attrition according to three areas: academic, social and intellectual misalignment with institutional culture and a low level of commitment (Long 2012:52). Tinto does not assign the sole responsibility of failure to individuals or institutions, nor does he promote the traditional view of failure. He takes into account variables unique to the institution, student and social context and how best to identify, align and integrate them.

Tinto's (1975) model, although critiqued, provides a solid foundation for and understanding of student retention. His model advocates that student retention is a combination of academic and social factors. When students enter an institution of higher education, they simultaneously enter a social structure with peers and students. Tinto argues that the integration of the two structures influences student commitment and motivates either retention or attrition. His model, therefore, provides a framework for positioning the internal dynamics, interaction and importance of academic as well as institutional social integration towards understanding student attrition, persistence and related student behaviour.

Contrary to Tinto – who focused on integration and student success – Bean (1981) focused on external social support for students.

Bean's model builds on business process models of turnover and the interaction of employee attitude and behaviour (Cabrera et al. 1992:145). Bean argues that student departure is parallel to labour turnover and that behavioural intention is a forecaster for persistence and retention. His model acknowledges the fundamental part that social interactions and factors beyond the institution has on the decision-making process and behaviour of students. His industrial model provides an alternate and complementary framework to that of Tinto in which to position a wider range of social factors so as to understand student retention and persistence.

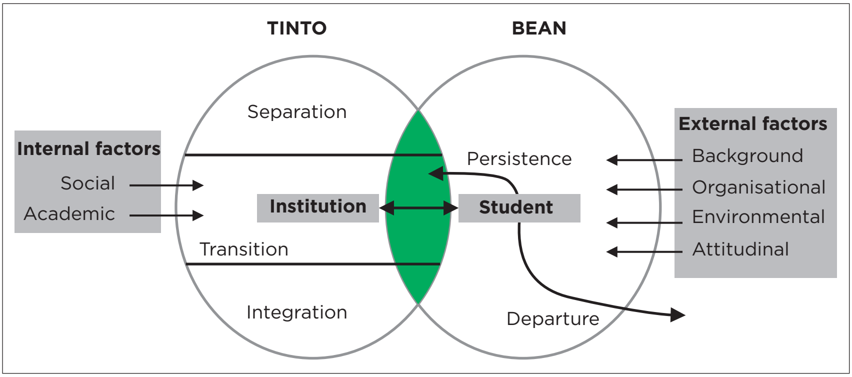
Combining the models of Tinto and Bean provides a clear foundation to understand student retention, attrition and related attrition behaviour, as together they:

- Provide an understanding of social and academic integration emerging from a social perspective and the external factors influencing personal fit.
- Put emphasis on both internal and external dynamics that influence attrition behaviour.
- Put emphasis on the influence internal factors shared between the student and institution (e.g. orientation programmes and socialising with peers and the integration thereof) and external factors (e.g. family, friends and finance) have on the student's perception and belief of, and attitude towards the institution, and the personal fit between student and institution.
- Provide an understanding of challenges faced by students registered on a full-time and part-time basis.

The models of Tinto and Bean are combined and illustrated in Figure 4.1.

As illustrated in Figure 4.1, factors influencing student attrition behaviour include:

- student background
- the social environment surrounding the educational institution
- the institution's organisational structure


TINTO
BEAN
Separation
Internal factors
Social
Academic
Institution
Student
Persistence
External factors
Background
Organisational
Environmental
Attitudinal
Transition
Integration
Departure

Source: Gaffoor (2019:28).

FIGURE 4.1: Internal and external factors influencing student persistence and departure.

- the institution's academic environment
- student attitudes.

Literature study

The analysis of social factors influencing attrition behaviour is dominated by the work of Tinto (1975). Attrition, according to Tinto (1993:55–56), is the end result that 'arises from individual isolation, specifically from the absence of contact between the individual and fellow members of the social and academic communities of the institution'.

Student–institution mismatch is not uncommon in post-compulsory education, mainly as a result of unrealistic prospective student expectations and inadequate support by institutions, especially in the first year (Cook & Rushton 2009:9). With reference to TVET, Papier (2009) reported that:

> [*R*]espondents agreed that the NC(V) programmes were high-quality curricula aimed at a specific niche market, but that students who had been enrolled, particularly in 2007, had not been the most appropriate students for these programmes. (p. 7)

The result of a mismatch is commonly a failure to meet academic requirements, or what Tinto calls 'voluntary departure'. Departure, Tinto (1993:49) claims, is 'voluntary in the sense that [it occurs] without any formal compulsion on the part of the institution'. Furthermore, 'these attributes reflect the character of the individual's social and intellectual experience within the institution' as opposed to reflecting academic difficulties. He (Tinto 1993) further emphasises that 'the more satisfying those experiences are felt to be, the more likely students tend to stay and complete their studies'. Conversely (Tinto 1993):

> [*T*]he less integrative they are, the more likely are individuals to withdraw voluntarily prior to completing their course of study. It is for students to be, and to feel, part of an institution and its social environment. (p. 50)

According to Tinto (1993:140), the concern over student retention is widespread. The common tendency, he (Tinto 1993:140) notes, is to view early departures as dropouts and that 'all student departures are the primary consequence of failure of the individual to meet the demands of college life'.

Guiffrida (2006:451) argues that 'Tinto's assertion that students need to "break away" from past relations and customs to become integrated into the college societal and academic realms' is well-established in higher education literature. Furthermore, 'the more that students are academically and/or socially integrated into the institute, the greater their commitment to completing their studies are' (Guiffrida 2006:452). Tinto's (1993:92) framework for his attrition model (Tinto 1993:91) draws from anthropological research conducted by Arnold Van Gennep (1960), described in his book 'The rites of passage in tribal societies'. Tinto (1993:92) described Van Gennep's (1960) work as 'being comprised of a series of passages leading individuals from birth to death and membership from one group to another', referring to it as 'stages of separation, transition and incorporation'. Tinto (1993) describes each of the stages:

> Separation (stage one) refers to the separation of the individual from past associations. Transition (stage two) occurs when the student seeks membership from the new group by interacting with them. Incorporation (stage three) encompasses new patterns of interactions with the aforementioned members and establishing membership as an active participant. (p. 93)

Tinto's model has been used in studies on retention and persistence in higher education in South Africa and, according to Pather (2015), has been applied to a wide range of different contexts in higher education, which, she argues, helps to identify factors that influence student experience, performance and persistence. Tinto's model has also been used by Koen (2007) in a study on interaction to support accountability between institution and student, measured through stronger institutional policies. Pather (2015) has also used his model in an analysis of first-year student experiences.

A study by Ngcobo (2009:67) provides reasons why students complete post-compulsory programmes. Some, he argues, complete studies because of social integration and relationships developed with others during their studies, whilst others do so in obedience to their parents. Ngcobo identifies personal, social and academic factors that emerge within educational settings, irrespective of whether students' decision to complete a specific programme was intentional or by chance. He (Ngcobo 2009:72) notes the following positive retention factors:

- improving results
- achieving personal goals
- satisfaction with teaching and learning quality at the institution or in the programme
- support received from family.

The work of Bean (1978) on retention closely relates to that of Tinto. In his early work, Bean (1980, 1981:11) applied the work on turnover in work organisations (Price 1977) to student attrition. Price argued that six independent variables increase job satisfaction, thereby decreasing staff turnover. The variables are remuneration, workplace friends, decision-making, work repetition, knowledge of work role and fair treatment.

Bean (1980) argued that commitment and persistence are influenced by personal and social factors. Personal factors include goal commitment, major (specialisation) and occupational certainty and confidence. Social factors include parents' level of education, close friends, advisory assistance, informal contact with education staff and participation in extramural curricular activities (Bean 1981:13). Bean (1981:13) also noted broader social influencing factors, which include 'opportunity to transfer, opportunity to get a job, family approval of the institution, family responsibilities, likelihood of marrying, and difficulty of financing one's education'.

Research design and methodology

An analysis is provided of attrition behaviour of students who enrolled in selected TVET colleges in the Cape Peninsula. Purposive sampling was used. Two programmes – both related to business studies – were selected for the study. Data were collected in 2016 with a self-administered quantitative questionnaire consisting of a rating scale, followed by a qualitative questionnaire.

Themes were identified from the data by means of content analysis. Content analysis is a common form of 'summarising and reporting written data' (Cohen, Manion & Morrison 2007:475) and is useful in research where there is a shortage of numerical data. Content analysis, according to Cohen et al. (2007), has a number of 'attractions':

- it focuses on language and linguistics and, therefore, meaning
- data collection is systematic and rules for analysis are 'explicit, transparent and public'
- data are available in a 'permanent form' and, as a result, verifiable and replicable.

From the comparative analysis, a model that includes a series of internal and external factors was used to identify reasons for retention and attrition at TVET colleges in the Cape Town area. The programmes were located on the same campus of one college. The community from which the samples were selected was a largely working-class community that was created by colonial and apartheid policies which has experienced significant post-apartheid social transformation. It was, therefore, a community affected by factors associated with poverty and the availability of new opportunities.

Business studies is a broad, knowledge-based programme that provides general preparation for employment within business. As a result, TVET college business studies attracts an array of students with various backgrounds and reasons for selecting it as a field of study. Compared to the construction programme, the business studies programme had a larger number of students from diverse backgrounds and with a broader base for determining factors and career opportunities.

The analysis of business studies students focused on two programmes in the Business Studies faculty: the NC(V) Office Administration; and NC(V) Finance, Economics and Accounting programmes. A total of 46 participants consented and completed a self-administered questionnaire. Out of the 46 participants, six were approached to be interviewed for the qualitative component of the study to achieve a more meaningful appreciation of the findings that emerged from the quantitative questionnaire. Three of these students consented to an interview. The interviews involved responding to seven open or broad questions and 11 closed or focused questions related to the factors influencing programme completion identified from the questionnaire. On completion of the analysis, the findings were compared to those of a similar study conducted on a different programme at a neighbouring college.

A number of external factors contributing to attrition and retention were identified from the self-administered questions. The interviews conducted in this study as well as the findings from the other above-mentioned study substantiated these external factors. Biographical data indicated that age and gender are key indicators for programme completion. Older, more mature students are more likely to complete a programme than younger students. Similarly, women are more likely to complete a programme than men.

By identifying social factors that contribute to retention, attrition and related attrition behaviour, this chapter contributes towards liberating individual actions by placing their causes in the social milieu from which they emanate. By focusing on the social milieu from which the sample emanates, this research determined the activities of people and the unanticipated (but not accidental) consequences of actions, which clearly aligns it with the critical research paradigm because deep-routed and multi-dimensional aspects related to retention and attrition were analysed with the aim of contributing towards social change. As Babbie and Mouton (2011) note, the intention of critical research is to:

> [*L*]iberate people from a state of alienation through the process of self-reflection, which indicates that the intention is to transform or change the human condition through a critique of those alienating or repressing factors which sustain their alienation or self-deception. (p. 36)

■ Findings and discussion

The following findings were collected from the consenting NCV student participants to the study, at the selected TVET college. Data was initially collected on 26 April 2017 through a self-administered questionnaire. After analysing the feedback received from the self-administered questionnaire, data collection coverged to interviews conducted on 02 August 2017 to gather greater clarity on factors identified from the self-administered questionnaire.

The reasons why NC(V) Business Studies students completed the programme in which they had enrolled, as gleaned from the self-administered questionnaire (Gaffoor 2019:97), are:

- clarity of reason for enrolment
- student's programme readiness
- social interaction
- age, gender and maturity of student
- student employment intention
- friendliness and supportiveness of teaching staff
- teaching quality
- inclusion and development of soft skills
- involvement of parent or guardian
- availability and nature of college's student support services
- funding and its availability
- programme's career path orientation
- assistance with labour market entry.

Internal factors related to programme completion and attrition behaviour

Students rated factors that influenced their views on programme completion in order of importance. The highest-rated factors were:

- quality of teaching and learning experience
- friendliness of teaching staff
- social interaction and interaction with friends.

Teaching quality strongly influenced student behaviour. Participant A25 noted:

> Teaching quality helps one understand the work better. The work is transferred in a way I can relate to and it is relevant to daily activities, as opposed to examples which are not relevant to us as youth. (Participant A25, student, 2017)

Similarly, Participants B6 and B24 noted, respectively:

> Teaching quality, as each lesson comes with a positive message, making it memorable and easier to understand, and assists you if you do not understand first time. (Participant B6, student, 2017)

> Friendly teachers, because when someone is friendly you feel accepted and welcomed, and you will return for that friendliness. Friendly people come across as knowing their job and would assist you at any time and not get frustrated, and that made me return and enjoy my programme completion. (Participant B24, student, 2017)

The inclusion of practical work featured as a significant factor influencing student behaviour related to teaching and learning, as did access to college resources like computers and dedicated computer laboratories, structured timetabling of sessions dedicated to the completion of practical tasks or tasks requiring access to computers. Student experiences related to the inclusion of practical work and access to facilities were both positive and negative. Participant A25 noted practical aspects of the programme and access to computers to complete the practical tasks and the library as both positive and negative:

> ‘There are no dedicated computer labs, therefore, I needed to bunk (decide not to attend) certain classes to complete my assignments due to lack of resources at home’ (Participant A25, student, 2017).

Participant B6 noted enjoyment of practical work related to workplace exposure, but least enjoyed lecturer mood swings and student protests that disrupted class time and examinations:

> ‘I enjoy the friendly and motherly caring nature of teachers, but least enjoy certain teachers’ unpredictable mood swings and emotions which dampened my college experience’ (Participant B6, student, 2017).

One question specifically sought to identify what students regarded as reasons for their friends not completing their programme. Participant A25 noted academic reasons:

> ‘Some failed a subject or level and others had personal challenges at home that prevented them from studying full time’ (Participant A25, student, 2017).

Participants noted finances, motivation and a mismatch between expectations and programme reality. Participant B6 noted:

> Many of my friends who left had financial issues and had challenges in receiving a bursary. They became tired of travelling to and from

> college with personal money or by walking to college and gave up, rather seeking employment. (Participant B6, student, 2017)

Participant B24 noted:

> My friends were not motivated by what they were studying, thinking it was an easier option to achieve their NQF Level 4 qualification. When they encountered the quality and type of workload presented by the NC(V) programme they realised that their expectations were not aligned to reality. (Participant B24, student, 2017)

Two questions sought to identify if participants contemplated departing college early. Participant A25 indicated that early departure was a consideration:

> There was a time I intended exiting my programme before completion due to family circumstances, but I know how difficult it is finding employment with a part-qualification and decided to complete my educational opportunity to change my personal and family circumstance. The specific factor of influence on campus was my bursary allocated to my studies in accordance to my attendance. (Participant A25, student, 2017)

For Participant B6, early departure was never a consideration:

> My programme completion was based on family motivation and me aspiring to family members who had completed their studies. The specific factor of influence on campus was the friendly academic staff and the manner in which they transferred information, making the programme more acceptable. The teaching style helped me understand the curriculum content in relation to real-world context. My lecturers constantly reminded me what is expected of me, giving me the desire to stay. The campus environment and location are safe, making my decision easier to complete my studies. (Participant B6, student, 2017)

The college experience as a whole featured as a retention factor. Participant B24 said:

> Having fewer friends, meant less peer pressure to negatively influence my decision or academic goals. The department and campus location allow for quiet and focused study areas, and teachers are friendly and make us aware of the world out there and our expectations versus reality. (Participant B24, student, 2017)

Social interaction with peers influenced different students differently. Although all participants said that peer support and motivation positively influenced their behaviour related to learning, they indicated the preference for social interaction to be limited to the classroom and a preference to study alone. Similarly, differences of opinion were recorded as to how peers influenced behaviour. Participant A25 noted that:

> 'I can always approach them to show me how to complete a task or explain it to me' (Participant A25, student, 2017).

Participant B6 noted that peers:

> '[...] are a huge distraction in my life. Most times they are negative and not motivational towards my academic goals' (Participant B6, student, 2017).

Participant B24 noted:

> 'They create distractions and not all of them contribute academically (group-work), so it is frustrating to explain everything. They are of no benefit in class time either' (Participant B24, student, 2017).

The predominant response gathered from the interviewees was that lecturers were influential internal factors influencing student behaviour – in their overall disposition, their content delivery and their willingness to assist students in realising and aligning programme expectation with the realities of the labour market. Teaching quality and supportive interaction with lecturers were regarded as important to programme completion. Lecturers had a greater and more immediate influence than the campus student support services and parents. Students noted appreciation of lecturers who supported and guided them beyond curriculum requirements.

Participant B6 noted that:

> '[*T*]eachers told us they were glad to teach us and went the extra mile outside of curriculum and classroom requirements' (Participant B6, student, 2017).

However, conversely, as regards using support services, the same interviewee noted:

> I only use academic support and extra classes for the subjects that offer them. My motivation off campus comes from my parents and healthy academic achievement competition with my sister, studying a different course at a different TVET college. I would generally seek assistance from one specific subject teacher who has always played an encouraging and supportive role since 2015 in Level 2 for myself and my friends. (Participant B6, student, 2017)

Participant A25 noted:

> I do not make use of any support structures available on campus. My friends in my community influence me positively. I generally seek support from my parish priest (religious community leader), who gives me sound encouragement and advice, reminding me to keep the faith through challenging times. (Participant A25, student, 2017)

Participant B24 agreed and noted:

> College open days are a great reminder for existing students. Access to existing students helps remind us of what is expected out there specifically in our field of study, and job role requirements after graduation. For academic and personal support, I generally have specific teachers who have assisted me since enrolment in 2015 and continue to assist me. If they do not know, they will ensure to refer or assist me to obtain an answer or get the needed support. (Participant B24, student, 2017)

None of the respondents made use of the student support services to support their programme completion but rather made use of additional services offered by certain lecturers and subjects. All reported that family support played a significant role in their success.

External factors related to programme completion

The main reason for enrolment for an NC(V) programme was to obtain a qualification comparable to a school-leaving certificate also consisting of a work-related element. Existing work experience was, therefore, a programme completion factor. As one student said:

> ‘The practical experience I gain is a competitive edge over students attending traditional public secondary school’ (Participant, student, 2017).

The second interviewee noted:

> I did not cope academically at a traditional public secondary school and gave up after failing two subjects in Grade 12 (Level 4 final year). Enrolling at TVET provided me with an alternative route to progress to higher education without the judgment of age in relation to qualification. (Participant B6, student, 2017)

All three participants indicated that failure within the schooling system motivated their decision to enrol in a TVET college. They were all of the opinion that a TVET qualification improved labour market entry possibility.

When asked what they thought could improve college support structures to encourage programme completion, one student said that nothing should change. Another student said the following:

> The college should give structured additional classes to struggling students for specific subjects. It should also provide students with job experiences related to their field of study, namely job shadowing from Level 2 already and increase experience hours or exposure leading up to Level 4. This build-up would better equip students when the world of work arrives after graduation.

The third interviewee was of the opinion:

> [*T*]raining seminars and events received at Level 4 should be included at Level 2 and Level 3 as well, for example, the dress code, role play, job shadowing and mainly work-based exposure (WBE). If you only do it at Level 4, it serves as ‘once off’ which can be forgotten, but if introduced at Level 2 and reinforced through to Level 4, it increases familiarity and reduces pressure in Level 4. This gradual reinforcement would provide good working practice of industry requirements, especially the soft skills.

Attrition behaviour

Clearly, attrition behaviour is exhibited by students facing attrition-related challenges. Behaviour, once registered, includes motivation, intention and pressure, and in the cases of students interviewed in this study, peer pressure and financial pressure. The potentially negative behaviour exhibited whilst at college is, to a certain extent, determined by internal factors. Potential attrition behaviour is, however, brought to the college by existing negative experiences related to academic performance and the teaching and learning process. The interviewees desired additional classes and alternative learning experiences, like seminars, events and WBE.

A study conducted with NC(V) construction students in 2015 at a neighbouring college provided similar, but more specific, evidence of attrition behaviour. As with the business studies programmes, friendships and positive relationships acquired whilst studying featured strongly as a reason for retention and positive behaviour. One student specifically stressed that one of his lecturers would go 'out of his way' for his students (Lawrence 2017:65). Negative lecturer behaviour featured as a reason for discontent and negative behaviour, whilst positive lecturer behaviour positively influenced student behaviour. Similarly, as with business students, prior negative academic experiences negatively affected student behaviour. One student noted that he had specifically left school because he struggled with mathematics. Mathematics was, however, a key element of the NC(V) in construction. 'Ever since I was at school', he noted, 'I could never fully understand mathematics. This became a very huge burden for me and it was kinda [*sic*] the big reason why I left the college' (Lawrence 2017:60).

Attrition behaviour was influenced by several factors that the participating students regarded as beyond their control. These included not regularly attending class because they could not afford the cost of transport, domestic challenges and feeling that they simply could not understand mathematics. Students lacked career guidance from college student support services, which left addressing behavioural challenges to lecturers (Lawrence 2017:87–88). One student became emotional when he spoke about his inability to do mathematics despite continued lecturer assistance and counselling (Lawrence 2017:60–61).

Conclusion

Social integration, interaction and dynamics play a significant role and influence student behaviour, manifesting in attrition behaviour, subsequently leading to either persistence or early departure. Social background, family life and a lack of academic success prior to enrolment in post-school educational institutions are clearly influential factors resulting in attrition behaviour. Similarly, the teaching and learning experience whilst enrolled in post-school education and peer pressure resources available to students are significant. Attrition behaviour and its causes are not simplistic and comprise complex interrelated factors, including finance available, friendships, family life, self-perceptions, interests and personal goals.

This chapter combined attrition and retention theoretical constructs, namely Tinto and Bean. Findings indicated that factors that form attrition behaviour are caused by those traditionally regarded as social, intertwined with those that would traditionally be regarded as psychological and academic. Attrition behaviour is clearly the result of individual intention, which is itself interlaced with influencing factors, some of which are direct, whilst others are indirect.

Chapter 5

A postcolonial perspective on discipline in South African schools: Survey and response

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Abstract

Learner discipline problems in schools and the call for the decolonialisation of education are two striking features of the current South African education scene. The aim of this chapter is to report on research that entailed an examination of the intersection between these two phenomena. The notion of and the call for decolonisation or postcolonialism in education are clarified and critically interrogated and found to be problematic and inadequate. A subsequent examination of the problem of learner (in)discipline in South African schools and of literature on this issue reveals that an acceptable level of learner discipline needs to be established that will be consonant with the prevailing contextual imperatives, particularly the insistence on decolonisation or the postcolonial narrative in education. The chapter concludes with a suggestion about how not only to practically achieve this but also how to incorporate this in the scholarly discourse on the maintenance of sound learner discipline in South African schools.

Introduction

The current South African education scene displays two striking features. The first is a persistent call for the decolonisation of education. Although 'decolonisation' is a vague and problematic concept, it has in 2015–2016 brought many of the country's principal universities to a standstill for several months (cf. Habib 2019; Van der Walt & Wolhuter forthcoming). The second outstanding feature of the current South African education scene is the problem of (learner) indiscipline in schools. Each of the chapters in this book contains evidence that supports this statement, as does the literature cited in this chapter. Two concrete examples illustrate the point. In 2019, the principal of a top-performing school in the Vaal Triangle wrote a letter to the parents announcing that the school management would no longer fill vacancies of teachers who left the school because of the ill-discipline of learners (Marx 2019:6). In 2017, the South African Teachers' Union (SADTU, or *Suid-Afrikaanse Onderwysersunie* [SAOU]) discovered in an extensive survey of teachers that 85.1% of the respondents had had experience of learners interfering with their attempts to maintain discipline, 79.4% had been verbally abused by learners, parents, colleagues or school management, 10.3% had been physically attacked, 13.9% had suffered victimisation and 25.2% had suffered damage to their property (Marx 2019).

No research has up to now been done on the intersection between these two prominent features of South African education: decolonisation and the phenomenon of ill-discipline in schools. The objective of this chapter is to report on research conducted on the aforementioned issues, namely an examination of the interrelations, the mutual and reciprocal correlates, and causality and consequences of decolonisation, particularly its possible impact on school discipline. The call for decolonisation or postcolonialism has already evolved into a prominent philosophy in South African education, amongst others, with respect to learner discipline in schools. In this chapter, it is argued that any attempt to restore or to establish a desirable level of learner discipline in South African schools will have to be consonant with the precepts of decolonisation as a philosophy currently (in part) underpinning South African education.

The discussion starts with an exposition of the research method that was followed. The section 'Philosophy or lifeview and worldview as a factor shaping education systems' contains a discussion of the scholarly recognition of and discourse on philosophy as a shaping force of education systems. The concepts of 'postcolonialism' and 'decolonisation' are then explained and clarified. That is followed by a discussion of how the calls for postcolonialism and decolonisation have evolved into a philosophy, even a philosophy of education, initially abroad or internationally, and then gradually also on South African soil. The body of scholarly literature on learner discipline in South African schools is then surveyed and assessed for the purpose of constructing a postcolonial or decolonial perspective on the issue of learner discipline in schools. The chapter ends with a conclusion apropos of the aim of the chapter.

Research method

Scholars in the field of education avail themselves of the entire range of research methods of the humanities and the social sciences. Robson (2011) groups these research methods as follows: methods of data collection; methods of data analysis and methods of data interpretation. Research starts with the collection of data. Once collected, the researcher must analyse the data in order to reduce it[26] to sensible proportions – that is, to summarise and categorise the data.

After having shaped the data into manageable and understandable proportions, the researcher attaches a particular meaning, understanding or explanation to the analysed data. Several methodological tools enable him or her to interpret the data. Confronted with the great structural complexity of the systems with which the researcher is confronted, he or she typically resorts to the combined meaning- or significance-making method of interpretivism–constructivism. This enables him or her to make sense of the situation, both physically–educationally and philosophically. In this way, new order is created, a new understanding of the situation is gained, or a new solution suitable for a particular community (such as South Africa at this point in its history) is discovered. Plotnitsky (2006:52) appropriately quipped in this regard: we find ourselves in 'a dynamic time-space or a sea of energy of thought, a space at the edge of chaos [...]. Thinking must confront this chaos'. A few years earlier, Labaree (1998:11) concluded that there is nothing like confusion to create opportunity for new knowledge to emerge. New knowledge emerges when the researcher begins to construct his or her understanding from the data (Thanh & Thanh 2015:24). The meanings attached to the researcher's experience tend to be subjective and, therefore, subject to subsequent adaptation and correction. According to Haddadi et al. (2017:1082), only temporal and context-bound hypotheses are possible and the inquiry is entirely value-bound. A particular research project typically involves all three of the operations enumerated above (in fact, in view of the definition of research and of scientific knowledge proffered above, it could be argued that each of the three operations is an indispensable element in all research projects).

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[26] Although 'data' is a plural noun, reference is made to it as if it were a singular, as researchers generally tend to do.

In addition to the above, the research reported in this chapter is the end product of three further research methods: a literature survey, mainly at the level of data collection; grounded theory, primarily at the level of data analysis and the comparative method, most salient at the level of data interpretation.

A literature review yields a general overview of the current body of knowledge on the topic under investigation (Maree 2016:28; Maree & Van der Westhuizen 2013:26). According to Ferreira (2012:33), a literature review supplies a platform that can serve as a knowledge base for research to be carried out, one that enables the researcher to gain better insight into the research issue or the field of scholarship. In the research reported in this chapter, literature surveys were conducted to gain a deeper understanding of and insight into the state of knowledge pertaining to:

- philosophy as a shaping factor in and of education systems
- decolonisation or postcolonialism: conceptual clarification and its rise as a distinctive philosophy, particularly as a philosophy of education
- learner discipline in South African schools.

Grounded theory was employed thereafter. This approach entails the development of or allowing a theory or a theoretical framework to emerge from the collected data, where theory up to that point had not been developed or where theory does not yet exist (Van Wyk & Taole 2015:176–177). In the research reported in this chapter, a postcolonial perspective on learner discipline developed or emerged from the consulted literature.

There is as yet no unanimity in the field as to what the comparative method amounts to, particularly in education scholarship. In a classical text in comparative education entitled *The Problematic Meaning of 'Comparison'*, doyen in the field of comparative education, Erwin Epstein (1992) delineates three main notions, all three of them with irreconcilably divergent views on 'comparison' in this scholarly field. His discussion of these orientations and an assessment thereof fall beyond the scope and aims of this research and hence this chapter. For the purposes of this research, the following perspectives developed by Wolhuter (2015:24–26) were employed as a working definition of comparative education (see also ch. 10 for another application of the same 'definition'). His definition embodies comparison as only one of the basic three perspectives on education. Comparative education has a threefold perspective on education:

- an education *systems* perspective
- a *contextual* perspective, and finally
- a *comparative* perspective.

Education as such, that is, the process of an adult or educator educating or teaching a child or educand – although of key of interest in cognate scholarly fields of education, such as sociology of education or philosophy of education – normally lies beyond the purview of comparative education. Comparative education as a scholarly field focuses firstly on the education *system* within which such activities occur. Comparative education is interested in all broader issues that somehow pertain to the education system *per se*, rather than for instance, the engagement or interaction between an educator and an educand in a single classroom or the activities within a single educational institution.

Examination of such phenomena by scholars of comparative education occurs within the context of the framework and parameters of a particular education system. Secondly, education systems are examined within their respective societal contexts and are seen as (being) shaped by or as the outcomes of a number of societal forces (geographic, demographic, social, economic, cultural, political and religious). Finally, comparative education is not content with examining only a single education system in its particular societal context. Even in single-unit studies (abundant in the field, cf. Wolhuter 2008:326), the studies are contextualised by relating them to general concepts in the field, in the supposition that also such limited studies could contribute to the existing stock of knowledge of education systems and hence are useful for further comparison (cf. Wolhuter 2015:2–22). According to this perspective, comparison as a research method amounts to comparing various education systems, each shaped by its own unique societal context.

In the research reported in this chapter, the comparative method was employed to particularise a generic postcolonial perspective on learner discipline for the South African context and also to assess the resultant perspective of conditions in South African schools. The section 'Philosophy or lifeview and worldview as a factor shaping education systems' is devoted to a discussion of the scholarly recognition of and discourse on philosophy as a shaping force of education systems. Together with the discussion of the concepts of 'postcolonialism' and 'decolonisation' in the sections 'The rise of decolonisation or postcolonialism' and 'The 'decolonial or postcolonial' issue in the South African education discourse', the section 'The issue of learner discipline in South African schools' forms steppingstones towards the central theoretical argument of this chapter, namely that any attempt to restore or to establish a desirable level of learner discipline in South African schools will have to be consonant with decolonisation as a philosophy currently underpinning South African education.

Philosophy or lifeview and worldview as a factor shaping education systems

The heading of this section is borrowed from an article published in 2014 (see Wolhuter et al. 2014:547–577). The title relates to the awareness in the scholarly field of comparative and international education that the (societal) context should be recognised as a shaping factor or force in and of (national) education systems dates from the epoch-making 1900 Guilford Lecture presented by Sir Michael Sadler (1861–1943) entitled *How far can we learn anything of practical value from the study of foreign systems of education?* (cf. Wolhuter 2015). In this lecture, Sadler laid the basis for the 'factors and forces' approach to comparative education in terms of which comparativists developed schemes for analysing the contextual forces that shape (national) education systems. This brand of comparative education reached its zenith in interwar Europe and North America (i.e. between 1919 and 1939) but has remained a strong paradigm in comparative education research up to this day (cf. Wolhuter 2008:334–336).

During the interwar years, and also during the years immediately after the Second World War, the 'big three' of comparative education scholarship – Isaac Kandel (1881–1965), Nicholas Hans (1888–1969) and Friedrich Schneider (1881–1969), especially the latter two – drafted extensive models for the analysis of the societal contextual forces that shape education systems. Their approach has been employed by comparativists ever since, including scholars such as Arthur Moehlmann, Vernon Mallinson, Ph. Idenburg, and on South African soil, H.J.S. Stone, H.J. Steyn and others. The contribution of the Dutch comparativist Ph. Idenburg (1921–1991, University of Leiden) offers a good example of how this approach was applied. Idenburg enumerates the following societal forces (which he referred to as environmental systems) that shape education systems: geography; demography; science and technology; the social system; the economic system;

the political system; and religion and life and world philosophy (lifeview and worldview) (Idenburg 1975). The other theoreticians mentioned above similarly accorded a place to philosophy or lifeview and worldview in the range of societal forces that shape education systems.

The position enjoyed by philosophy or lifeview and worldview in and of education in the comparatisvists' theoretical schema suffered a setback in the 1960s when the 'factors and forces' phase in comparative education was replaced as the major paradigm in the field by 'the social sciences' in the historical evolution of comparative education (cf. Wolhuter 2015). From then on, attempts were made to turn comparative and international education into a social science with a predilection for quantitative methods, a supposedly exact science intent on examining the interrelations between education and economic and social indicators rather than 'abstract' philosophies or lifeviews and worldviews as shaping forces of education systems. This 'social science turn' was a Copernican revolution in the field in that comparative and international education no longer focused on societal forces as shaping forces of education systems but began doing the diametrical opposite, namely to concentrate on the effect of education (as an independent variable) on society, including its effect on economic growth and social mobility. Joseph Lauwerys' article entitled *The Philosophical Approach to Comparative Education*, published in 1959 in the *International Review of Education*, signified this change in view on philosophy. Lauwerys was a leading scholar in the field at that point in time, founding president of the Comparative Education Society of Europe and professor of Comparative Education at the Institute of Education, University of London. In this article, Lauwerys expressed the opinion that recognition of and attention to philosophies as shaping forces in and of education systems were pointless because of the difficulty in measuring the presence and effect of any philosophy on a particular education system (Lauwerys 1959).

It could be argued, however, despite this setback that philosophy or lifeview and worldview as an acknowledged shaping factor of education systems suffered in the field of comparative education during the 1960s, it has maintained a definite impact on research in the field of comparative education and its role and impact have constantly been recognised and acknowledged. Comparativists have noticed in the process of describing the education system of a specific era or geographical space that philosophy or lifeview and worldview has played a role in, for instance, how the entire education system is typified or referred to. Terms such as Soviet education, Bantu education, apartheid education or colonial education come to mind in this regard, as does Nyerere's Education for Self-Reliance or Paulo Freire's Pedagogy of the Oppressed. Some education comparativists also persisted with their recognition of the place of philosophy of education or lifeview and worldview in the examination of education systems. In 2004, for instance, the journal *Comparative Education* published a special issue on the theme of philosophy, education and comparative education (Halstead & McLaughlin 2004). Modernisation theory also provided an unmistakeable philosophical superstructure for much of the comparative and international education scholarship during the 1960s and 1970s and even beyond. During the social science phase of practising comparative education, the gaining of independence of large parts of (what was then referred to as) the Third World, especially in the Middle East, Africa, South and South East Asia, and also the Cold War with two world powers vying for favour amongst the developing countries, formed a major source of inspiration for practitioners of the subject. Foreign aid (of which education formed a large component) became what Coombs (1990) referred to as the 'fourth dimension of American foreign policy', together with diplomacy, and military and economic aid. Modernisation theory contended that the developing countries were in need of 'economic, social and political development' (Harber & Mncube 2011:243) or modernisation and that the quickest way of providing in their needs would be to just give the people in these countries with more education (cf. Fägerlind & Saha 1984:49). Modernisation as a 'philosophy' consequently became the most prominent theoretical orientation in comparative education during the 1960s and early 1970s (cf. Kelly, Altbach & Arnove 1982:516). Modernisation theory moots a set of characteristics that are regarded as typical of being modern or modernised, such as being directed towards the future rather than being oriented to the past, and the belief that the world and society can be rationally explained, comprehended, planned, ordered and controlled (rather than ruled by the whims of supernatural forces) (cf. Fägerlind & Saha 1984). Modernisation theory was much more than just an economic, social or political theory; it assumed the status of a fully fledged philosophy.

When the Cold War ended in 1989, and the superpowers no longer needed to implement foreign aid as an instrument to rake the developing countries into their respective spheres of influence, the impact of modernisation theory began to dissipate in the scholarly and public discourse. Two 'new' philosophical forces began guiding the global education expansion and reform project in the post-1990 world, namely neoliberalism and an insistence on the recognition of basic human rights (cf. Wolhuter & Van der Walt 2019). A close analysis of neoliberalism reveals that it is much more than just an economic doctrine (Van der Walt 2017a, 2017b; Van der Walt & Wolhuter 2017): it has spilled over into aspects of life beyond economic affairs, amongst others, education. In turn, the insistence on the recognition of human rights in due course meant that the creed of human rights has in time gained the status of something more than just a legal system or even a moral regulatory framework in international politics (cf. Wolhuter & Van der Walt 2019), namely that of a philosophical superstructure.

The dominance of these two philosophical forces in directing the global education project and the strong claims of their protagonists regarding the universality of the principles that these philosophies embody have recently been challenged by the rising philosophy of decolonisation or postcolonialism. Although it is as yet difficult to exactly pinpoint any physical or concrete impact of this ‘new’ philosophy on the shaping of education systems, it is clear that it has already gained widespread currency in both the public and scholarly discourses regarding education in the Global South and even in some instances has attained dominance, indisputability and even hegemony in large parts of the Global South. Any serious discussion of education issues, in the Global South in particular, nowadays is deemed to be inadequate if it does not prove to have been interrogated also from a postcolonial or decolonisation perspective.

Before the construction of a postcolonial perspective on the issue of learner discipline in South African schools could be attempted, attention had to be given to the rise of the postcolonial or decolonial narrative (as well as a conceptual clarification of these terms). The results of that exercise are presented in the section ‘The rise of decolonisation or postcolonialism’. The section ‘The issue of learner discipline in South African schools’ contains the result of a survey of the literature and theories about learner discipline in South African schools.

The rise of decolonisation or postcolonialism

The term ‘postcolonialism’ refers to a discourse against the ongoing subordination, economically, culturally, epistemologically, educationally, even politically and otherwise, either imposed from outside or within the mindset of previously colonised people (cf. Stanford Encyclopaedia of Philosophy 2017). For the purposes of the research reported in this chapter, ‘decolonisation’ refers to attempts to break the shackles of colonialism. Postcolonialism as a discourse rose in recent decades was mainly driven by influential intellectuals in the Global South, such as Frantz Fanon, Gayatri Spivak, Edward Said, Aijaz Ahmad, Vivek Chibber and Dipesh Chakrabarty.

Fanon (1925–1961) was a French West-Indian trained psychiatrist turned political philosopher. In his book entitled *Black Skins, White Masks* (Fanon 1952), he wrote about the psychological effects of colonialism on the lives and minds of subjugated black people. In a later book, published just before his death, entitled *The Wretched of the Earth* (Fanon 1961) – written during the Algerian War of Independence and other struggles for independence in Africa – Fanon wrote about violent activism as justifiable in a campaign for independence.

Gayatri Spivak, Indian-born (in 1942) – the current professor of Comparative Literature at Columbia University, United States of America – used Derrida's technique of deconstruction in her book entitled *Can the Subaltern Speak?* (Spivak 1983) to analyse the Eurocentric way of dealing with her university subject, her thesis being that the Eurocentric approach was depriving all subjugated people, though especially women, of space for speaking out. Her book *Post-Colonial Reason: Towards a history of the vanishing present* (Spivak 1999) is a scathing attack on the Western consumer culture that she saw enveloping all parts of the globe.

Egyptian-born professor of Literature at Columbia University, United States of America, Edward Said (1935–2003) established postcolonialism as an academic field. His book *Orientalism* (Said 1978) describes how the West or Westerners view or depict Asia: as static, uniform, undeveloped, at the same time patronising, exotic, eccentric and untrustworthy.

In his book entitled *In Theory: Classes, Nations, Literatures* (1992), Indian academic Aijaz Ahmad (*c*. 1932) takes a wide sweep against not only the Western Canon in its dealings with the non-Western but also against poststructuralism, postmodernism, the use of the term 'the Third World', and even against Edward Said and Salman Rushdie. A diehard Marxist, Ahmad developed his own brand of postcolonialism. He employs the book to explain the role of cultural theory in the decolonisation movement. The book covers the Cold War era, the momentous historical changes in the world of 1992, and then takes the post-1992 world characterised by global capitalism and the concomitant global hierarchy as datum line for his cultural critique.

Indian-born sociologist at New York University, United States of America, Vivek Chibber (*c*. 1965), expounded his version of postcolonialism in a book entitled *Postcolonial Theory and the Specter of Capital* (Chibber 2013). In the book, he takes issue with the postcolonialism of the likes of Edward Said, stating that they perpetuate the Western vision of Asia (the Global South) as something exotic, different from the West. He criticises the neglect of class analysis in postcolonial studies, and in Marxist terms, views the subaltern state of societies in the Global South, because of their locus in the global system of capitalism characterised by unequal power relations, as the source of the woes of these nations. Indian historian Dipesh Chakrabarty (*c*. 1948), in turn, criticises Western historicism (the view that social and cultural trends are determined by history, and the belief that historical development is the most basic aspect of human existence), particularly what he describes as the Western linear conceptualisation of time with liberalism as the universal end of history and nationalism as the end of historical–political evolution.

The sentiment against decolonisation and against the persistence of northern hegemony in the Global South is still running strongly in our own time. This can be observed in the events surrounding the devastating fires that broke out in the Amazon Forest during August 2019. French President Marcon in all seriousness called for the abrogation of the sovereignty of Brazil over the Amazon Forest – for this region to be placed under international guardianship. The Brazilian president, in turn, refused substantial international monetary assistance for the effort to extinguish the fires, as this would amount to acceding to a form of neocolonialism (Myburgh 2019). The central theme of former Secretary of State of the United States of America Henry Kissinger’s book on China (Kissinger 2011) is that the key to understanding the Chinese political orientation in the world of today is its fear for a recurrence of the imperialist incursions that it has suffered since the beginning of the 19th century.

The decolonialisation of education in Africa has been a prominent theme in the scholarly and public discourse about education ever since the time of the gaining of independence. In 1961 – that is when most African countries became independent – the Ministers of Education of the then 35 independent states in Africa convened in Addis Ababa from 15 to 25 May 1961 to plan the development of education in independent Africa. Their efforts resulted in the drafting of a document entitled *Outline of a Plan for the Educational Development of Africa* (UNESCO 1961). At this conference, issue was taken with the colonial heritage in education, and it was decided that education should be made relevant to the needs and situation of Africa. One of the themes of the post-independent African education reform plan was to change the inherited Eurocentric curricula of schools so that curricular content could reflect the natural and cultural heritage of Africa as well as the worldviews, ideals, attitudes and values of Africa (Merryfield & Tlou 1995). Irrespective of the frequency and ambitiousness of all the plans, the fact remains that education in Africa still bears much of the colonial imprint (cf. Wolhuter & Van Niekerk 2010:7). Elaborate schemes such as Nyerere's *Ujamaa* (Education for Self-Reliance) in Tanzania and the *Harambee* schools in Kenya all ended in failure or at least abandonment (cf. Wolhuter 2004). Virtually every smaller-scale project done in the name of designing an education answer to the requirements and needs of the African context, such as the Brigades in Botswana, suffered similar fates (cf. Mupimpila & Narayana 2007). The double-shift schooling system also fell into disfavour amongst its clientele (cf. Muhammad 2018). A salient feature of African education that testifies to the tenacious hold of its colonial heritage is the language of learning and teaching. Sixty years after gaining independence, the unvarying pattern in Anglophone Africa is that, from the fourth school year, English is the language of learning and teaching, and in Francophone and Lusophone Africa, French and Portuguese are the respective medium of instruction in education institutions from the very first school year.

Attempts to rid education of its colonial heritage occurred elsewhere in the Global South since the conclusion of the Second World War, that is, in the era of decolonisation. In India, for example, the Report of the Kothari Commission (1966) was meant to serve as the blueprint for the first major overhaul of education since independence on 15 August 1947. The Commission stated that one of the motivations for redesigning education in India was the fact that the inherited education culture and system were not rooted in the culture and traditions of the people of India and, therefore, tended to alienate students from society (National Council of Education Research and Training, India 1966:10).

Postcolonialism as such – also as a philosophy of education in the Global South in particular – has clear merits, one of the most important being the ideal to construct an education system that is fully aligned to the societal context in which the system is embedded. This is consonant with a principal precept of the field comparative and international education scholarship (as explained above regarding the contextual forces that should be accounted for). Postcolonialism and decolonisation, nevertheless, remain problematic and contentious for at least three reasons:

- It is difficult to determine exactly what (that is, which cultural content) should be deemed as ‘colonial’ and what should be regarded as ‘indigenous’. For example, when a South African reads this chapter, he or she would recognise the letters as typical of the Roman alphabet (i.e. European) but would not necessarily know that this alphabet was based on one inherited from the Asiatic Phoenicians, whose system of writing was based on the Mesopotamian (Middle East) and possibly (note the uncertainty here) the Egyptian (North African) systems of writing. The paper of this book that the reader now holds was first invented in China, and the printing process, according to the best evidence, in both Europe and

China, independently. This chapter is written in English, a language with its roots in Europe but replete with loanwords from all parts of the world and from many languages. The concept of 'school' is of Greek origin. Such confusing examples can be multiplied.
- Even if the 'colonial' could be theoretically distilled or distinguished from the 'indigenous', would doing so be practical and useful? Would it be useful to ban all printed books, paper, the English, French, Portuguese and Afrikaans languages and Roman alphabet from education in Africa? Assuming that this could be done, what would education in Africa gain from such an exercise?
- Even if this could be done, would it be advisable for previously colonised countries to do so in an age of globalisation and cut-throat competition? Would it be prudent for them, and would it make sense to their inhabitants if their students were denied epistemological access to the body of knowledge published in English, widely recognised as the global *lingua franca* of the academic world?

Given these three critical questions with respect to the call for, and the very notion of postcolonialism or decolonisation in education, it comes as no surprise that, in the education context, the discourse on this issue has been limited to rather hazy objections against the colonial heritage and vestiges of colonialism in education systems in the Global South. The same applies to education offered to those who migrated to the Global North but with cultural or historical roots in the Global South. The decolonisation project arguably will not succeed without first determining exactly what the objectionable vestiges of colonialism are and offering substantial and meaningful indigenous alternatives in their place. The lead article by Takayama, Sriprakash and Connell (2016) entitled *Contesting Coloniality: Rethinking Knowledge Production and Circulation in Comparative and International Education*, in a special issue of a top scholarly journal on the decolonisation of scholarship, gives a clear indication of how difficult it would be to do so.

The 'decolonial or postcolonial' issue in the South African education discourse

South Africa's post-1994 education policy rests on five fundamental principles, namely democratisation, desegregation, decentralisation, equal educational opportunities and multicultural education (RSA 1995; Wolhuter 1999). Because one of the criticisms levelled against the pre-1994 education in South Africa was that it was too Eurocentric, the solution was – in line with the 1955 *Freedom Charter*, endorsed by the current governing party in South Africa, the African National Congress – that education should reflect the *common* heritage of all humanity; that South Africa belongs to *all* who live in it. The following excerpts from this charter underscore this point (The Freedom Charter 1955):

> [...]
>
> All people shall have equal right to use their own languages, and to develop their own folk culture and customs; All national groups shall be protected by law against insults to their race and national pride.
>
> [...]
>
> **The Doors of Learning and Culture Shall be Opened!**
>
> The government shall discover, develop and encourage national talent for the enhancement of our cultural life; All the cultural treasures of mankind shall be open to all, by free exchange of books, ideas and contact with other lands; The aim of education shall be to teach the youth to love their people and their culture, to honour human brotherhood, liberty and peace. (p. 3; [*emphasis in original*])

These excerpts seem to indicate that the post-1994 course for education to take was in the direction of multiculturalism. This was in line with a stream of thought globally, particularly in the Global North, where the 'creed' of multicultural education evolved from an add-on to monocultural education to multicultural education, later, in the course of time it became enmeshed with anti-oppression education, anti-racist education, and after the 9/11 catastrophe, intercultural education (cf. Wolhuter 2013). Gradually, however, postcolonial thought also emerged amongst the Avant Garde in the Global South and also amongst minorities in the Global North with historical–cultural roots in the Global South. The student unrest in 2015–2016 in South Africa brought the call for the decolonisation of education forcefully to the surface in the scholarly and public debate on education (cf. Van der Walt & Wolhuter, forthcoming) and caused the notion of multiculturalism in education to be supplanted by the idea and cause of decolonisation. The unrest and ill-discipline at higher education level (universities and colleges) served to compound a problem that by that time already had risen at school level, particularly in high schools. University principals and other authorities were from then on called to face unruly behaviour in their institutions, much as principals, parents and the community at large had to deal with at school level and classroom level.

This begs the question: What does the discourse on postcolonialism or decolonisation have to say about the issue of learner discipline? In order to discover an answer to this question, the literature on learner discipline in South Africa had to be surveyed. The section ‘The issue of learner discipline in South African schools’ contains the results of that investigation.

The issue of learner discipline in South African schools

The published research on the issue of learner (in)discipline in South African schools covers the following topics: the causes or correlates of learner discipline problems; the types and incidences of learner discipline problems; the effect of learner discipline problems on teachers and learners; and coping with learner discipline problems. Each of these will now be unpacked.

Causes or correlates of learner discipline problems

Research into the causes, or at least the correlates, of learner discipline problems has produced a large body of publications by South African and foreign scholars of education. The research revealed that the state of learner discipline in a class or school is related to six categories of factors, namely learner-oriented, teacher-oriented, school-oriented, education system-oriented, parent-oriented and society-oriented factors. The incidence of *learner* disciplinary problems and the nature of such problems also vary according to the ages or school phases of the learners; problems occur at a higher frequency and are also of a more serious nature at secondary school level than in primary schools (Wolhuter, Oosthuizen & Van Staden 2010). The *teacher*-oriented factors are interrelated with learner discipline issues in the sense that teachers (as educators) are expected to cope with the deviant behaviour of the learners in their classes. The extent to which they succeed in doing so depends on their competencies as educator, their success in serving as a role model for learners and their success in maintaining healthy teacher–learner relationships (Eloff et al. 2013). *School*-oriented factors constitute a third set of factors affecting the state of learner discipline in a school. These factors include 'school management arrangements, school leadership, school infrastructure, class size (the student–teacher ratio)' (Van der Walt & Potgieter Wolhuter 2016) and the 'organisation climate and organisational culture' of a school (Van der Westhuizen, Oosthuizen & Wolhuter 2008). The (national) education system of a nation provides a structured environment and framework (the management hierarchy of circuits, districts, provincial and national offices) for the teacher-oriented and school-oriented factors, including the norms and standards for teacher performance, school infrastructure, authority and the manifestation thereof in the school, and the authority and the working environment of the teachers in the system (cf. Wolhuter, De Wet & Van der Walt 2019). Such national education systems do not exist or function in a vacuum but are embedded in and shaped by their respective national societal contexts. It is customary in the discipline of comparative and international education (which has as its subject of study, amongst others, the interrelationship between education systems and their societal contexts) to distinguish the following as contextual forces that determine the nature of the education system: its geography, demography, sociocultural situation, language situation, level of scientific and technological development, economy, politics, and religion or lifeview and worldview (Wolhuter & Van der Walt 2018). All of these factors somehow converge – like the rays of the sun through a lens – in the functioning of the school and in the work of teachers in a classroom and hence also on how discipline is managed in the school and in the respective classrooms. Conversely, an incident in a classroom, for instance, where a teacher has shown bad judgement in meting out discipline or punishment to a learner, might have repercussions in other sectors of the system. The parents of the learner, the principal, the school governing body, the district manager, and even the judiciary and Member of the Executive Council of the province in which the school is situated might eventually become involved.

Four sub-factors can be distinguished when considering the *parental* factor in connection with learner discipline in schools: these are 'styles of parenting', the model or example set by parents, the incidence of stress in the family, and the relations between parents and the school (Wolhuter & Van der Walt 2020). Much research has been done about parenting style, amongst others, investigations into the correlation between parental style and behavioural problems of children at school. These studies deliver an adverse assessment on uninvolved, authoritarian and permissive parenting styles and a positive verdict on an authoritative parenting style (cf. Wolhuter & Van der Walt 2020). The latter parenting style is described as the parent trying to direct the child's activities in a rational issue-oriented manner (Wolhuter & Van der Walt 2020). Regarding the parental model or example, parents as the main role players in the raising of their children play a pivotal role in shaping the attitudes in children that result in either good or unacceptable behaviour in schools. Family stress (this term is used here to denote emotional as well as material problems from which families may suffer, for example, marital discord, poverty and bad housing) has been demonstrated by research to be associated with behavioural problems of children at school (Department of Education and Science and the Welsh Office 1989:135). Children hailing from families in the lower socio-economic strata are more exposed to such conditions; the incidence of misbehaviour amongst children from these families, therefore, generally occurs more frequently than is the case amongst children from more affluent families (Bear 1998). Research shows a relation between parental engagement in school activities and the level of disciplined behaviour of their children at school too (Department of Education and Science and the Welsh Office 1989:124–127). Finally, features of society, such as violence, lack of social capital and moral bankruptcy, all have knock-on effects on the behaviour of learners in school, as has been pointed out by public leaders (Daniel 2018) and by scholars (Osman 2017). This observation has been borne out by empirical research (e.g. Ngwokabuenui 2015:64, 69).

Research on the types and incidences of indiscipline

A number of empirical studies on the state of learner discipline in South African schools have been published during the past two decades. These include investigations into the experiences of principals (Mentz, Wolhuter & Steyn 2003), teachers (cf. Wolhuter, Oosthuizen & Van Staden 2010), learners (cf. Wolhuter & Oosthuizen 2003) and community leaders (cf. Van der Walt, Wolhuter & Potgieter 2009). The most recent Progress in Reading Literacy Study (PIRLS) revealed that the incidence of bullying in South African schools was higher than in any of the other participating countries (Mullis et al. 2012). The results of all these studies show that there are no grounds for complacency about the state of school discipline in South Africa.

The effects of learner indiscipline on teachers and learners

The effects of the dismal state of learner discipline on teachers, principals and learners in South African schools have also been reported in scholarly publications (cf. Mentz et al. 2003; Wolhuter & Oosthuizen 2003; Wolhuter & Van Staden 2008). In this case as well, there are no grounds for complacency either. In the introduction to this chapter, reference was made to a school principal who sent a circular to parents informing them that the school governing body would no longer replace teachers who left the school because of learner discipline problems at the school (Marx 2019:6). In a sample of South African teachers, Wolhuter and Van Staden (2008:397) found that learner indiscipline in their schools caused 85% of the respondents to be regularly or sometimes unhappy in their work. It also caused occasional or constant family stress in the case of 58% of them, and health problems for 54% of them. In their survey of 64 Grade 6 and Grade 7 learners, Wolhuter and Oosthuizen (2003) discovered that six of the respondents complained that they could not do their school work properly because of the unhealthy state of learner discipline in their classrooms; four of them complained that poor learner discipline contributed to the rising stress levels and short-temperedness of their teachers and one wrote that the noise in the classroom was unbearable. Indiscipline has an effect on principals too. In their survey of principals of Afrikaans-medium schools in South Africa, Mentz et al. discovered that 26.3% of the respondents had considered leaving the teaching profession because of the poor state of learner discipline in their schools.

Coping with indiscipline

Literature suggests that the most difficult problem with respect to the learner discipline issue in schools, at least as far as teachers are concerned, pertains to methods for maintaining discipline

(Wolhuter & Van Staden 2008). Reactive or retributive methods still dominate, despite the fact that, from an educational point of view, preventative methods, particularly those associated with positive discipline, would have been preferable (cf. Oosthuizen, Wolhuter & Du Toit 2003). The reactive or punitive methods currently still being used in classrooms include reprimanding, extra work, isolation from other learners in the classroom, isolation by banning the child from the classroom, detention, reporting to the principal and laying a charge at the school governing body (Wolhuter & Van Staden 2008:394–395). The respondents in these studies do not seem to have discovered any positive, pre-emptive and effective methods to maintain or restore discipline in classrooms. Wolhuter and Van Staden found that 50% of those teachers who used isolation in the classroom as a method to maintain discipline rated this method as ineffective, and the same applies for the 70% who resorted to isolation outside the classroom (banning from the classroom).

■ Synthesis: Decolonisation or postcolonialism and learner discipline

Although seemingly totally unrelated, decolonisation and learner discipline do in fact dovetail in certain respects. The presentation of research results and the discussion thereof this chapter allowed the surfacing of a few pointers suggesting that the decolonisation or postcolonial discourse indeed might have something to say about learner discipline in school. The first is that education systems are shaped by contextual factors. Broadly speaking, in the Global South (and arguably also in those schools in the Global North that serve communities with historical and cultural roots in the Global South), a discordance between education or school culture and community or culture may result in lived experiences of alienation amongst learners or students. Such experiences might contribute to behavioural or discipline problems in their ranks. The second is that the very latitudes of acceptable behaviour might be a point of contention: behaviour regarded by and in the school (with its exogenously derived hierarchy of values or norms) as acceptable or unacceptable might not be regarded in the same light by the community or the culture surrounding the school. The third is that methods of maintaining discipline may be at variance with the culturally accepted views and ways of the community served by the school.

Despite the potential for developing a postcolonial or decolonial perspective on learner discipline as briefly alluded to in the previous paragraph, postcolonial scholarship has so far largely avoided this topic. A search on the ERIC (Education Resources Information Center) database on 09 October 2019 with keywords 'postcolonial' and 'student discipline' yielded only three entries. None of them gives any postcolonial or decolonial perspective on learner discipline as such. These publications seem to confirm the conclusion already alluded to above, namely that many researchers in the field of postcolonial education and decolonisation operate with a rather hazy notion of these entities or phenomena. Postcolonial criticisms of existing education regimens are resultantly also vague. They take the shape of critiques of the vestiges or elements of Western or colonial culture in education systems without spelling out in detail what those elements are, nor do they offer anything concrete in the place thereof. The issue of learner discipline does not even figure at all in the thin crop of publications covering what Paulston (1977:388) refers to as the paradigm of 'cultural revitalisation'. This term refers to organised attempts by communities to create a more satisfactory education culture at a local or a national level, in opposition to an imposed hegemonic education culture (see Tom, Suarez-Krabbe & Castro [2017] on initiatives by the First Nation Community in San Francisco, the Cape Verdi expatriate community in Lisbon and the Roma community in Cordoba, Spain; also Joseph Elder [1971] on the decolonisation of education in India; Rolland Paulston [1972] on cultural revitalisation and educational change in Cuba).

In the few instances where learner discipline is being touched upon in the postcolonial education literature, such as by Dunne and Adhzahlie (2016:223–224), the discussion of learner discipline comes in the form of an echo of the key accusation of postcolonialists, namely that schools – though their learner discipline regimens serve as instruments to (even literally) beat learners into submission – become docile acceptors of Western values and norms. The complaint is that they tend not to offer a form of education in which learners are active participants, learning to draw on their own cognitive faculties and own their own cultural heritages. Ayaga (2015), also writing from a postcolonial perspective or paradigm on church schools in Ghana, touches on the issue of discipline but in the end merely reports that the church and the state blame each other for the poor state of discipline in schools. This approach is not helpful in the construction a new postcolonial or decolonial solution to the issue of maintaining discipline in schools. Philanthropic education outreach and aid projects in the Global South by especially the United States of America, but also other Western powers, are similarly one-dimensional projects of neocolonialism, because they do not refer to concrete examples of objectionable importations from the West or from former colonising powers, nor do they proffer any detailed alternatives (see, e.g. Mfum-Mensah 2019).

With reference to the situation in South Africa, it could be said that the process of determining the parameters for sound discipline in schools within the frame of a Constitution with its progressive Manifesto of Human Rights (and here it should be added that even the Creed of Human Rights has been the object of calls for a need to be decolonised, see Baretto 2018) and for purposes of a very diverse learner population, has produced its share of challenges, problems, distasteful events and turmoil. Differences of opinion and attitude with regard to issues such as hairstyles and the wearing of religious and cultural paraphernalia (Olivier 2016; Samango 2017) indicate the need for a decolonial or postcolonial discourse to show a way through this complex situation.

The spate of violent activism associated with the #FeesMustFall campaign, which erupted on South African university campuses during the closing months of 2015, incurred damage to the amount of R150 million to buildings and infrastructure at universities (Tandwa 2016). The campaign was characterised by calls for decolonisation, anticolonialism and free education but at the same time accompanied by unacceptable behaviour and indiscipline (the destruction of property and the disruption of classes). The intensity of the campaign also underscores the need for determining from a postcolonial or decolonial perspective the latitudes of acceptable behaviour and of conflict resolution. Habib – the rector of a university who was directly affected by the excesses of the campaign – wrote about his frustrations about not being able to ascertain what exactly it was that the students agitated for. He also complained about what he regarded as their inconsistent behaviour (Habib 2019). The underlying problem here seems to be that the concept of ‘postcolonial or decolonial’ education has not yet been satisfactorily argued and defined and that the notion of ‘discipline in a postcolonial education set-up’ could, therefore, not be defined and described in concrete detail. The scholarly field of anthropology (the field of scholarly enquiry about cultures) has so far not succeeded in providing guidelines for a culturally aligned approach to discipline in education. In fact, the field of anthropology itself has been criticised for its Eurocentrism (see Gupta & Ferguson 1997). In South Africa, the field has come under criticism for its alleged support of the segregation policies of previous governments (see Jansen 1991).

■ Conclusion

Turmoil and discipline-related problems, in particular, have erupted in South Africa around issues such as hairstyles and religious attire and symbols. Incidents such as these support the central argument of this chapter, namely that a need has risen to attain consensus about what would count as acceptable behaviour on the part of school learners and about the methods for maintaining forms of discipline that would be consonant with the mores of the communities and the cultural systems in the catchment areas of schools. The following could be suggested because of the current lack of a clear articulation in the scholarly literature of what a postcolonial or decolonial pedagogy and the concomitant maintenance of discipline could comprise.

The process developed by Lovegrove, Lewis and Burman (1989:275–278) could be considered in response to the general criticism by postcolonial theorists about the authoritarian and exogenous (imported and colonial type) nature of education practices. They suggest that every learner in the class be requested to write 5 to 10 rules that he or she feels would help the classroom to function properly. The teacher then assembles the rules written by the learners and compiles a new list in which he or she consolidates or synthesises the suggestions tabled by the learners. He or she then takes the rules to the principal for comment, suggestions and approval, and they ask the parents for their input. Once consensus has been attained amongst all the constituents, the rules are posted in the classroom. The class holds regular meetings to discuss whether the rules are still working or whether they need to be changed. This process is repeated in every class and then also school-wide in order to establish a set of rules for the entire school. Lovegrove et al. (1989:259) suggest that the final school discipline policy should include the following elements: an outline of moral values, for example, respect for one another as human beings; how the rules of the society in which the school is situated will be reflected and applied, and attention to technical details, such as how the rules that have been adopted would be employed in facilitating the teaching–learning or education process. This process should be repeated in as many schools as possible.

A procedure such as this could arguably result in a set of classroom and school rules, and be translated into a code of conduct for learners and one for teachers, as per the *South African Schools Act* and hence serve as a regiment or guideline for learner discipline that could form the basis for facing any criticism of neocolonialism. Scholars could consider subjecting the efforts of as many schools as possible to closer examination. The dissemination of their research findings could contribute towards making schools safer, more congenial and disciplined spaces for teaching and learning. This would also assist the schools in ridding themselves of all the residual elements of colonialism and cultural imperialism.

Chapter 6

Discipline from an indigenous knowledge systems perspective (Dealing with discipline and ill-discipline from traditional and modern perspectives in educational contexts)

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■ Abstract

Discipline has always been a cornerstone of most African traditions, customs and rituals. Without discipline, we do not have a sense of focus, which is pivotal to achieving set goals or required outcomes in the classroom, workplace or broader society. Many issues pose challenges and threaten school education in South Africa. Learner ill-discipline and unruly behaviour in schools are just some of these. The reality is that poor discipline erodes the affordances of school education and could lead to learning spaces that do not optimally foster the development of 21st-century skills. In this chapter, the focus is on learner and initiated youth (initiation schools) discipline and ill-discipline. Learner discipline and ill-discipline are pertinent challenges that the South African education system faces as far as improving the quality of education and creating a more conducive and engaging learning environment. In this chapter, the authors explore how 'discipline' has always been maintained in two important traditional customs, namely being initiated (rite of passage) and being inducted to become a traditional doctor or a diviner. In both rites of passage, the initiates follow a set of rules that instils discipline. Elders are sources of experiential knowledge in both. As initiates into manhood, the young men are instructed to abstain from sexual activities at least two to three months before the rite. They are also instructed to follow a prescribed diet and maintain high levels of discipline by not drinking water or eating salty food for seven days after the operation. Initiates are taught how to discipline each other

and how to protect each other as brothers. They are assigned different social responsibilities, such as being part of the traditional disciplinary committee that sits on community cases where they must decide as a collective on disciplinary measures, which must be applied in different social community cases, the building of schools and the protection of the community (‘*morafe*’) in times of war. Collective responsibility is instilled as a highest level of discipline. However, the authors also highlight practices such as ‘*ukumetsba*’, or ‘*ukosula*’, which should be questioned in a country that staggers under a wave of gender-based violence. The leitmotif of this chapter is a systematic review of literature on traditional discipline of learners or initiates, from an indigenous knowledge systems perspective. The authors also argue that these practices are often ‘other-directed’ rather than ‘self-directed’. Self-discipline entails assuming social and moral responsibility for one’s own actions, and it should be driven by one’s own volition and not because of a fear of punishment. In the conclusion of this chapter, the authors highlight this conundrum utilising third-generation Cultural-Historical Activity Theory (CHAT) as a lens. It highlights both the good and the bad associated with traditional initiation schools and how it might either promote or suppress discipline in public schools.

■ Introduction

As the focus in this chapter is on learner discipline from a traditional African perspective, it is imperative to first explain what the concept of discipline means. According to the Oxford English Dictionary (2014), ‘*discipline* is defined as the practice of training people to obey rules, or a code of behaviour using punishment to correct disobedience’ (Lexico n.d.:n.p.). In addition, Dr Shaheda Omar – Director of Clinical Services at the Teddy Bear Clinic, as cited by Ebrahim (2017) – describes discipline as the:

> [*M*]eans of teaching acceptable behaviours and unlearning maladaptive behaviours with support, guidance and direction in managing behaviour. Discipline is about setting limits, clarifying roles, responsibilities and mutual expectations, and creating a predictable, orderly and stable life. It is not punitive and is in the best interests of the child. (n.p.)

There is a growing number of scholars who advocate for self-discipline and that discipline should be self-directed and not other-directed (e.g. changing behaviour because of the threat of punishment) (Bear & Duquette 2008).

For many years, punishment in the school system meant corporal punishment. Ebrahim (2017) reflects on changes in recent years by quoting Section 10(1) of the *South African Schools Act*, which:

> [*P*]rovides that no one may administer corporal punishment at a school to a learner. A person who contravenes this provision is guilty of a criminal offence and, if convicted, can face a sentence for assault. (n.p.)

Supported by research (e.g. Hymowitz 2000; Jinot 2018; Rossouw 2003), it is generally accepted that learner discipline has suffered decay, and many people believe that this is because of the abandoning of corporal punishment. Many people are exploring alternatives to corporal punishment (see e.g. Reyneke 2018).

The ultimate goal of educational systems and broader society is to enhance self-discipline in people. Bear and Duquette (2008:10) define *self-discipline* as the individual 'assuming social and moral responsibility for one's own actions, and doing so under one's own volition (i.e. not solely out of fear of punishment or to gain external rewards)'. These authors, however, acknowledge that fostering self-discipline asks for involvement by all stakeholders, such as parents, teachers and school management. Bear and Duquette also emphasise that engagement with young people should be characterised by love, care and respect and paying attention to the things that adolescents are doing right (rather than just focusing on misbehaviour).

When learners are ill-disciplined, they need to be disciplined in a humane manner which will not fuel aggression in them. The question arises whether indigenous knowledge practices related to discipline hold any lessons for the 21st-century classroom. The leitmotif of this chapter is a critical look at indigenous knowledge practices related to the enhancement of self-discipline in young people. The authors specifically focus on the alignment between disciplinary practices in initiation schools and government schools – two institutions that are attended by a large percentage of South African young people.

Respect between people – whether it is between traditional initiation instructors and their initiates, or teachers and their learners – is a *sine qua non* for enhancing discipline in young people. Ill-discipline in schools has a negative impact on both teachers and learners. Ill-discipline could result in learners not optimally benefiting from their education, and some teachers leave the profession because of frustration and feeling disempowered by the system and falling victim to a classroom where a lack of discipline erodes teaching and learning. The leitmotif of this chapter is to critically look at traditional ways of enhancing discipline, and to critically evaluate this indigenous knowledge, by making use of CHAT.

The old saying 'seeing is believing' also holds merit for cultivating self-discipline. Learners and initiates believe what they see from teachers and traditional instructors. Each day, as teachers, indigenous leaders and parents, we build a legacy for our children to inherit. A teacher must be fair and consistent with agreed policies on discipline by the school. All stakeholders – namely the school governing body, parents, teachers, learners, general staff and the Department of Education as represented by the school principal – inform such policies.

Dei et al. (2000), a Canadian scholar, in a foreword in a book titled *Indigenous knowledge in global contexts (multiple readings of our world)* writes that '[i]ndigenous knowledge have been systematically usurped and then destroyed in their own cultures by the colonizing West'. Ngũgĩ wa Thiong'o (1981:100), a Kenyan writer, wrote in a broader African context that 'Africa, as a continent has been a victim of forces of colonial exploitation, oppression and human degradation'. In the field of culture, he was taught to look to Europe as his teacher and the centre of human civilization and view himself as the pupil. In this event, Western culture became the centre of Africa's process of learning and Africa was relegated to the background.

In this chapter, the authors provide an African perspective on the issue of discipline. In an era where the 'decolonisation of the curriculum' is receiving increased attention, a focus on indigenous practices in terms of discipline is needed. This also sensitises school authorities to the dual world in which many South African young people find themselves – for example, initiates from initiation schools who also attend public schools often have to navigate the contested space between traditional and Western worldviews.

In its broadest sense, *education* can be defined as a conscious attempt to help people live in their society and participate fully and effectively in its organisation in order to ensure a continued existence (Sifuna 1990). Most educationists define the aim of education as guiding a child into maturity. An African child has always been exposed to both indigenous and formal education. Within the African, traditional society, the purpose of indigenous knowledge was to train young people for adulthood. Children were taught discipline, their social, economic and political roles as well as their rights and obligations. The instructional 'tools' included oral narratives, myths, fables, legends, riddles, proverbs as well as processes of observation and participation (Kenyatta 1965). This is equally true for cultural groups in South Africa, where learners are confronted by two juxtaposed worldviews, namely that of the school, often subscribing to Western norms, and traditional practices at home.

Methodology

This is a conceptual chapter, although limited qualitative research was conducted. Personal interviews were conducted with a female (*Songelwa*) and male (*Mohlomi*) traditional healer. The interviews were transcribed and coded according to the coding technique described by Saldaña (2009) to identify emerging themes from the codes. Furthermore, this chapter also has an element of autoethnography, as the first author (Thambe 2001) was an initiate at an initiation school when he was a young man of 23. Viramontes (2012:3) describes autoethnography as 'writing [that] involves personal expression about a particular event or situation'. This reflective writing provides the reader insight into one's own lived experiences of a phenomenon. Third-generation CHAT, as conceptualised by Engeström (1987), was utilised as a research lens.

The role of initiation schools in instilling discipline

Puberty rites is one significant traditional practice that instils discipline and fosters good morals in youth (both boys and girls). These traditional practices are strongly influenced by modernisation and education. From time immemorial, our ancestors have been practising traditional initiation ceremonies. The fundamental goal of both the rite of passage to manhood and womanhood is to ensure that initiates are trained and taught about discipline, collective responsibility, collective group values and to be responsible citizens in their respective communities.

As human beings and different tribes, we do not share the same ideals of culture, and we differ considerably in our methods of attaining the highest calibre of learners and initiates who will be manly or womanly and self-reliant. Culture is the yeast or glue of every community and ultimately of the nation and the country. It is a tool that can be used to instil discipline in children.

All cultural aspects, such as values, language, indigenous knowledge and rules, are important because culture is the totality of a people's way of life. According to Mazrui (as cited in Motlhankane 2014:1), culture serves at least seven functions, and the authors' focus is on the third function, with specific reference to initiation schools in South Africa and African diaspora. The third function is that 'culture provides criteria for evaluating what is deemed better or worse, ugly or beautiful, moral or immoral, attractive or repulsive'. Amos (2013) describes culture as a way of life of a group of people – it entails their behaviours, their values, symbols and beliefs that people accept. This happens subconsciously, and traits are passed mostly by communication and imitation from one generation to another. The focus in this chapter is on celebrating the affordances and cultural heritage related to initiations schools on the one hand but also looking critically at practices that might do more harm than good.

In the theatrical stage play entitled *Esuthwini* [Celebrate the Journey to Manhood], Thambe (the first author) stressed the importance of cultural evolution, as culture evolves and is not static. In addition, collective responsibility of all community members and all government stakeholders, such as the police, justice and health departments, are needed to deal with ill-disciplined initiated youth and learners. This would allow communities and the government to work collectively on how to deal with the worst, ugly, immoral and repulsive traits in the initiation custom, particularly ill-discipline of initiated youth and learners. Family, community, culture and traditions play an important role in instilling discipline in our children. In most traditional African cultures, initiation was a collective endeavour. The current practices of traditional initiation seem to be mainly focused on quick money and greed, thereby ignoring the key elements of instilling discipline and pride in the initiates who, at the time, are in a transitional stage to adulthood. As a society and community, we do not meet at the intersections and deeply connect with one another; this is a collective responsibility.

At the core of traditional initiation schools is a strong belief that initiates who are taught and instructed properly by elders should have good morals, be respectful, must be responsible citizens and should have the capacity to endure difficult situations. Initiates were taught tolerance, respect and endurance through perseverance. Even though it was through hardship, what was learnt at initiation schools helped prepare initiates to learn and develop good morals and discipline. According to Busari et al. (2017), in the precolonial traditional setup, children were taught to do good right from the infancy stage; this was done through instructions and day-to-day practical examples from parents and elders in the household. Other cultural aspects such as song, moral lessons and proverbs were employed during moonlight story sessions. Similarly, during the first author's initiation period in 2001, oral narratives, history, myths, fables, legends, songs, riddles and praise poems were passed on, taught and shared. In African and South African cultures, storytelling or folktales, which used to be part and parcel of South Africans' daily lives, are no longer evident and seen in our communities. During such sessions, elderly people served as a voice of reason, and their word of advice during storytime helped to shape the youth. Amos (2013) agrees and notes that, during storytelling, the older people were telling the younger ones stories that depicted attributes such as caring for one another, giving, discipline, greed and selfishness.

Ingoma – the song in Xhosa, or initiation rite in isiNdebele – teaches people, reprimands, educates and disciplines individuals. It heals and brings people together regardless of their religious beliefs, ethnicity and different languages. It is a chorus or a collective rendition rendered by a collective and it may also be individual. A collective in this instance is a community. Collective responsibility comes to mind, which is a crust of African philosophy popularised by Johnson and Johnson (2014) in a Western context. As the first author is an initiated person himself, he would be the first to admit that some discipline traits are not directly taught at initiation schools or institutions but rather indirectly instilled in young initiates who will soon become adults in their respective communities. At initiation school, one is not taught how to eat a fish but how to fish.

Discipline in all African and traditional institutions is envisaged in the militant spirit portrait by the respective initiates in their respective ethnic groups. Discipline in the Zulu regimen was clear in the ways they fought to protect their king (‘*inkosi*’), their society, their community and ultimately their nation. The famous bull horn formation (‘*impondo zenkomo*’ in Zulu) comes to mind, where the young soldiers protruded from both sides, left and right, running to attack the enemy, whilst, in the middle, the head consisting of the ‘*inkosi*’, experienced warriors and community elders steadily marched forward in attack. The Batswana Central Cattle Pattern is described by Huffman (2001), where the ‘*kgosi*’, the cattle and women in the middle or centre were no different from the Zulu bull horn formation made famous by the Zulu king, Shaka Zulu. Moreover, in Sepedi, *discipline* is referred to as ‘*koma*’, meaning initiation rite or regiment; ‘*esuthwini*’ in isiXhosa and ‘*mophato*’ in Setswana literally meaning [w]e are together as one, ‘*Re mophato*’, we work together, we are a team; therefore, we work as one unit. ‘*Re mmogo*’, also a Setswana word, means we are together, or oneness; unity, if you like. ‘*Esuthwini*’ in isiXhosa means a hidden place or a place of secrecy, or at the mountains, which are normally far away from people, hence the secrecy is associated with mountains.

Discipline in African and South African institutions is also taught indirectly. According to Matobo (2009:107), the term ‘“initiation” originates from Latin *initiare*, meaning to start, to introduce, and celebration of a secret religious service’. Initiation is a ritual that, across the globe, signifies the conclusion of childhood, and the transition to adulthood. Many organisations, particularly those termed ‘secret societies’, also induct new members through an initiation ritual. If the individuals has not gone through this ritual, they are not regarded as adults, however old they may be. Sadly, they are not then able to join society as respected members of the group (Froneman & Kapp 2017:3).

Thus, initiation performs two distinct functions, although both concern admissions to a new social standing as an adult and as a member of a group (Matobo, Makatsa & Obioha 2009). In Xhosa culture, initiation schools are ‘traditional universities’. This is where initiates learn values such as self-discipline, discipline, respect and collective responsibilities, to mention but a few. Matsela and Motlomelo (2002) write that initiates acquire, or are expected to acquire, from their training self-discipline and self-respect, leadership skills, commitment and loyalty to their country, which go hand in glove with law-abiding persons. According to Matobo et al. (2009), an individual who has undergone initiation is expected to be a changed person who could positively contribute to community debates and decision-making.

The great significance of the rites of passage, such as initiation in many societies, is that they provide the basic informal education to the initiates. Matobo et al. (2009) indicate that:

> Boys are taught economic knowledge, skills in negotiation and how to be good leaders in their societies. Art, music and oratory are also offered at initiation schools. Girls, on the other hand, are taught about the roles of women in the families and their communities. It is only through this rite that both boys and girls are elevated or may finally qualify to attain rights, responsibilities, opportunities and statuses in their families and communities. (p. 106)

Jautse, Thambe and De Beer (2016) highlight that, in Batswana culture:

> [*Y*]oung men coming back from the initiation schools (‘*bogwera*’) form a brotherhood called ‘*mophato*’, and this group then has a collective responsibility in society. During ‘*bogwera*’, the boys learn the responsibilities of being a respectful and responsible adult. Upon their return, they are then assigned a collective responsibility, which reminds one of Johnson and Johnson’s (2009) positive social interdependence in cooperative learning. According to Johnson and Johnson (2014), social interdependence exists when the outcomes of learning are affected by one’s own and others’ actions. (p. 446)

Matobo et al. (2009) assert that initiates are expected to acquire leadership skills, allegiance and dedication to their country, self-respect and self-discipline. Letseka (2013) likewise believes that indigenous education teaches 'good ethics, morals and values, such as humanness, neighbourliness, responsibility and respect for oneself and others' (Letseka 2013). Embodied, situated and distributed cognition means that 'cognitive processes are deeply rooted in the body's interactions with the world' (Wison, cited in Jautse et al. 2016). Learners develop their worldviews based on their (situated) engagement with people and the environment. Such cultural knowledge is constructed and, therefore, distributed in the community. Every society, whatever its level of development, has some form of purposeful education. Thambe reflected in his autoethnography as follows:

> When we were instructed as newly graduated young men in 2001, one elderly man like many other stood up and said, 'k(e) umntu uziyala ngokwakhe bantwana bam', singathetha sonke kodwa iziqibo zezakho'- meaning, behold, my children, a person must practice self- discipline, many people and others may preach all these good instructions but it is up to you as an individual to choose good and do good. (Thambe, autoethnography, 2020)

These are elders' ways of putting 'self' into discipline through instructions that are 'self-directed' in everything we do – one's 'self' is responsible for everything one does or practises, not 'others'.

Froneman and Kapp (2017:1) show that the 'manhood status achieved after the ritual accords men power and authority in the community over women and uncircumcised men'. Uncircumcised men are marginalised – for example, they are not allowed to socialise with other men. They are also often subjected to public humiliation (Froneman & Kapp 2017). There is also the practice of '*ukumetsba*', or '*ukosula*', which Froneman and Kapp (2017:2) describe as a setting 'where the initiate has sexual intercourse with a girl whom he does not intend to marry and whom he will "hate" afterwards'. It is, therefore, clear that, despite the positive attributes of initiation schools in cultivating respect and responsibility, there are also negative spin-offs, such as 'othering' people. In a context of school bullying, one needs to ask the question if such cultural practices could not corrode inclusivity in the classroom. In a country that suffers from extreme gender-based violence and an HIV and AIDS pandemic, questions should be asked about the practice of '*ukumetsba*', which can hardly be justified in an inclusive society. This discussion continues in the section 'Studying these indigenous knowledge practices through a Cultural-Historical Activity Theory lens' on CHAT later.

Discipline of the initiate in the divine world

A second cultural practice that also entails enhancing self-discipline is initiation as a traditional healer or a diviner. According to Chang (2002), '*ukuthwasa*' [divining initiation rituals] is a process during which initiates break away from their previous lives and become new beings that are recognised and given access and privilege to practise as diviners in the divine world. Chang (2002) describes '*ukuthwasa*' as the whole period of transformation from recruitment and apprenticeship to the final ritual performance that confers status as an authorised diviner. He adds that the root word '*thwasa*' has a few meanings, namely, (1) to emerge for the first time, (2) to become possessed by a spirit, (3) 'witch doctor' during apprenticeship, and (4) change of season, moon or personal state. The essential meaning that underlies his definition is the emergence of a new status or condition.

As a traditional doctor initiate ('*ithwasa*'), you kneel, head bowed when you speak to '*uGobela*' [traditional mentor]. The initiate is not supposed to look the senior traditional doctor ('*uGobela*') in the eyes; initiates must always be obedient, taught to connect with their spiritual being and maintain high levels of discipline in how they conduct themselves in the presence of their seniors or elders. As an initiate, one does not argue with or back-chat one's mentor, or even amongst yourselves as initiates, as it is viewed as being disrespectful. Furthermore, when interviewed on 11 February 2020, Songelwa, who is an experienced traditional doctor, said that when female initiates have their monthly periods, they do not enter the '*indumba*' [traditional hut] and do not touch '*imithi*' [herbs]. Songelwa added that both genders of initiates are not allowed to drink alcohol or engage in sexual activities; hence they should monitor their diet, which must not include libido-boosting foods, such as eggs, liver, lungs and so forth. Furthermore, as initiates, they must carry themselves with the utmost respect and obey all rules. If they break or bend the rules, they must know that they are disrespecting their spiritual guidance and their ancestors. Once graduated as a diviner, they must treat their patients with the utmost respect and dignity.

It is argued that discipline is embedded in these sets of rules to guide initiates who are viewed as learners who must be guided by the knowledgeable elder or instructor. In Nguni tribes, such as AmaZulu and AmaXhosa, '*ukuthwasa*' signifies more than particular individuals' fulfilment of becoming fully fledged healers or diviners. Most importantly, the initiates or the individual is reborn in the process. In Setswana, '*bongaka*' is still the most respected custom, the same as initiation ('*bogwera*'). When interviewed on 06 January 2020, Mohlomi, who is an exceptionally experienced traditional healer, said:

> [*W*]hen we discuss discipline on a traditional doctor or an initiate being prepared to be a practitioner, we have a two-dimensional category, discipline of erring members and discipline of good members. Traditional healers by tradition and customs are not allowed to write many things down and this is a calculated measure to protect the practice. This means many rules and regulations are not written down which is also the reason why there is a lot of speculations and debates around traditional healing. (Mohlomi pers. comm., 06 January 2020)

Mohlomi said that there are heavy practices to which a traditional doctor must adhere. It takes a firm disciplinary measure to be able to maintain what is taught outside the initiation school, which is literally translated as '*diagelong*' in Setswana. He adds that routines like waking up at 03:00 every morning to invoke ancestors by beating drums, singing, dancing and rituals to get ready for the day can be exhaustive for any individual. It would take a great deal of discipline to keep up with such a routine on one's own without the assistance of the initiation instructor ('*uGobela*') by one's side. For trainees or initiates to be able to absorb all hardships that come with the initiation, the person tasked with disciplining them must not feel any sympathy or pity for them. There are times when a healer is directly faced with huge evil or evil spirits that come with the client; a divine healer must face them with the initiate. This is done through fasting and abstinence from sexual intercourse, Mohlomi added. If such discipline is not properly handed down at the initiation school, healers are likely to lose many battles where they were supposed to have won by helping and saving a client or themselves. Throughout the initiation period, the initiates do not indulge in sexual activities, they do not get visitations from their wives or husbands in order to make them get used to being celibate – it is a disciplinary measure to save themselves and the custom itself keeps them pure.

Mohlomi also added that another form of discipline for initiates is to never share their training manuals, if any. This would put the instructor and the initiate at risk for attacks from fellow diviners. It is imperative for the trainee to make sure that no one gets to see the manual, as this may hinder his or her progress as well, thereby making the healer vulnerable to envious attacks. Such discipline is aimed at teaching initiates not to disclose too much critical information to the world they are going to serve. Mohlomi noted that most initiates who fail in this discipline at times end up selling herbs in *muti* shops or fighting chronic diseases. This serves as the punishment for their transgressions. Another disciplinary measure is wearing a '*khanga*' [diviners' cloth] with slippers or barefoot to prepare for climate and environmental challenges. Like soldiers, initiates must know that they must face any situation to save a client – even if it means climbing a snow-covered mountain to fetch some medicine, it must be done. It disciplines initiates not to believe 'I comfort only' but to be able to survive any type of life. According to Mohlomi, all these disciplines are handed down verbally and cordially by '*uGobela*', and some come to the initiate through dreams, visions or consciousness. At times, medications are prepared to calm initiates' nerves – some to strengthen their weakness and to cast out their fears. He also adds that corporal punishment is not part of discipline. It is mostly found in bogus diviners' initiation schools; most traditional healing initiation schools do not really punish the initiates. The '*uGobela*' must always have wisdom to identify what is troubling the initiate and should be able to find a solution, perhaps by excluding the initiate from teamwork to single mentoring until the initiate is able to focus and concentrate.

Discipline of erring members can range from staying longer at the initiation school until they have reached perfection. Initiates might be taken to areas they fear the most, for example, if they fear water, they may be tasked to dig herbs at dams and rivers. This is to discipline them to overcome what they thought was possible for their healing practice.

In the divine world, self-sacrifice is a discipline that ensures that, as a healer, one does not lead a lifestyle that may harm one's practice, thereby leading one to ignore one's patients. A healer cannot be at a party whilst a member of the community needs help. According to Mohlomi, modern lifestyle disturbs the life of many healers: 'at times, you find modern healers drinking at taverns and in the morning, they are consulting'. This is wrong, as the healer is risking people's lives and is failing the self-sacrifice discipline. Such a healer has failed a discipline known as '*go ikilela*', which means keeping oneself away from a dirty, infectious lifestyle. Purity is the essence of self-sacrifice; to be pure at heart, both spiritually and physically.

Furthermore, materials worn – such as wool wrapped around one's arms, cloth worn over one's shoulders and beads around one's neck – are not only for protection, they also serve as discipline enforcement. It would be hard for initiates to steal, drink alcohol or get involved in fights when wearing such costumes. Such attire also provides a sense of consciousness for initiates to be disciplined even after their graduations. Discipline is not enforced by other means at initiation schools; it is taught through imitation so that the initiate would in the end be able to absorb and use the knowledge responsibly. According to Mokgethi (2018), entering the divine world after undergoing extensive training is a passage between two social conditions in which the membership of a quasi-professional sodality fills the cultural gap between the individual and the social realms. Divining rituals serve to alter candidates' identity and consciousness, at the end of which they gain a new social status. Furthermore, Mokhethi says that entry into divination practice is a micro-level response to conditions in the macro-level world structure. The change often requires that initiates take on a new name of a divining ancestor who will be responsible for their spiritual guidance.

Discipline and ill-discipline in government schools stemming from learner participation in initiation schools

Many issues plague education in South Africa and world at large. In this chapter, the focus is on ill-discipline in classrooms. Many young people attend both initiation school and public school. Unruly and antisocial behaviour – such as bullying, gangsterism and suicide – seems to be at the centre of the said ill-discipline plaguing education. Researchers (Mohlaloka, Jacobs & De Wet 2016) argue that:

> [*T*]raditional initiation can have either a positive or a negative influence on the behaviour of initiates. Proponents of traditional initiation ('*lebollo*') believe that it inculcates good moral values in initiates and builds society by producing responsible, law-abiding citizens (Ntombana 2011). Opponents of initiation schools

> (Ntombana 2011:636), however, believe that the behaviour and actions of initiated boys do not conform to the expectations that are carried by the ritual; even though they have undergone the ritual, their lives are the same as when they were boys. Little research has been done on the possible influence of initiation schools on learner behaviour (Mohlaloka et al. 2016) and even less on how to address behavioural problems seemingly stemming from initiation schools (Mohlaloka 2014). Mohlaloka et al. (2016) found that many formal schoolteachers struggle to deal with the deviant behaviour of boys returning from initiation schools. Such behaviours include refusing participation in class discussions or to answer questions; being disrespectful towards female teachers and uninitiated male teachers; refusing to do certain tasks; and engaging in gangster activities. (p. 20; [*emphasis in original*])

Mohapi (2013) agrees with the above statements pertaining to ill-discipline, disrespect and unruly behaviour of initiated Ndebele learners, particularly boys. According to Mohapi, these initiated boys disrespect their teachers, especially female or uninitiated male teachers. This aspect is discussed further in the section 'Studying these indigenous knowledge practices through a Cultural-Historical Activity Theory lens' (see CHAT discussion).

■ The role of religious institutions in instilling discipline

Traditional initiation is regarded as a sacred religious practice and a mechanism for the maintenance of social order. It is believed to play a significant role in instilling discipline in the youth. Religion and race are often bases for solidarity or causes of hostility globally. According to Ellison and Bradshaw (2009), Conservative Protestants in terms of biblical beliefs tend to support corporal punishment in different proportions. Most researchers define religion in diverse ways. Some studies define religion as a system that influences the everyday life and experiences of an individual, such as moral values, goals and attitudes (Park 2005). Ayanleke (2013) states that Yorùbá (African) indigenous education teaches children to assimilate the following values into their individual belief in God: respect for elders; avoidance of conflict; spirit of sharing; knowledge of family lineage; avoidance of crime; knowledge of family roles; success through hard work and responsibility to the larger community, amongst others.

In the wake of Ocitte's work, Akínyemí (2003) and Awoniyi (1975) asserted that the principles of Yorùbá traditional education are based on a socialisation process whereby the dignified values are reinforced and encouraged by community members. Unruly behaviour and ill-discipline are discouraged, as they are the enemy of society. Gilligan and Furness (as cited in Horwath & Lees 2008) believe that the dominant religious beliefs of a community play a prominent role in structures, traditions, rituals and how life is conducted in that particular society.

Most researchers clearly differentiate between religion and spirituality, whilst other authors struggle with these two concepts. The various ways the concept of religion is defined highlight what is likely to happen in practice. The definition will differ from person to person. Ellison and Bradshaw (2009) write that Conservative Protestants are indeed more supportive and practise and endorse corporal punishment. Ellison and Sherkat (as cited in Horwath & Lees 2008) note that Conservative Protestants believe that physical discipline should be used only in a calculated way and never when parents are angry or lose control. Hunter (as cited in Ellison & Bradshaw 2009) explains extensively the links between socio-political conservatism and their support for corporal punishment. He views these links as a clash between two camps: the orthodox camp and the progressive camp. Orthodox members advocate and believe in absolute truth and morality, which may be administered by community members with little or no change at all. Progressive members believe in change of times – that culture and traditions are forever evolving, as they are not static. The progressive view is that moral judgement must move with the times and take cognisance of the current social conditions and norms of society. The role of religious views in discipline is further examined in the section 'Studying these indigenous knowledge practices through a Cultural-Historical Activity Theory lens' (where a CHAT lens is used).

Does corporal punishment instil discipline?

Corporal punishment is a popular disciplinary practice among African and South African cultural groups despite it being legally banned, and it is often also used excessively at initiation schools. According to Baumrind (1997), extensive research shows that the effects of corporal punishment differ from culture to culture and other subgroups. Most consulted research seems to concur that learner and initiate discipline and corporal punishment have always been informed by culture and religious beliefs globally. Today, there are still countries where corporal punishment is legal, for example, in Malaysia (Balasingam, Nor & Shah 2019). Conservative Protestants are viewed as the majority which advocates this practice. The use of corporal punishment to discipline learners, initiates and children remains controversial. In addition, according to other evangelical thinkers (as cited in Ellison & Bradshaw 2009), corporal punishment is viewed as a biblically sanctified and necessary technique through which parents can 'mould the will' of the child. Hartwell et al. (1992) agree and add that it is believed that this would curb the traits and tendencies towards wilful disobedience of authority. It would ultimately help to prepare the child for humble submission to God's will and spiritual salvation. In addition, several recent reports and research link corporal punishment to traditional initiation schools, government schools and religious beliefs. Firm discipline and corporal punishment are viewed as valuable tools in traditional initiation schools, religious training and in military contexts. It is believed that these are pivotal to securing compliance from young learners, initiates and young adults. Most researchers agree, arguing that evangelical writers and leaders are strong proponents of corporal punishment and justify physical discipline. Most parents believe that corporal punishment is useful and may trigger positive outcomes in children (Schapera 2004). In most African and South African proverbs lie a deep suggestion and a strong belief in corporal punishment. The Setswana proverbs *Bogwera go rupa jwa thupa* and *ya mosimane ke e nkgwe* – both roughly translated as initiation without a rod is not a good initiation – are equivalent to the famous English proverb *spare the rod, spoil the child*. In contrast, Bear and Duquette (2008:11) make it clear that 'physical punishment develops little self-discipline and simply teaches the child that it is OK to act aggressively and to try to avoid getting caught'.

■ Worldviews on discipline and ill-discipline

Wolters (1989) defines a *worldview* as a collaborative initiative of communities. He sees it as the yardstick by which challenges may be tackled and faced. The integrative worldview encourages teamwork and interactive collaborations. It is the glue that brings together the integrative and modernist worldviews. In this worldview, opposing views are understood on a deeper level and given in-depth meaning. Van der Walt (2008) describes a worldview as a network of varied truths.

One is tempted to concur with Hood's (2010) approaches to dealing with learner discipline and ill-discipline: the egalitarian way approach and the individualist approach. The egalitarian approach is characterised by cooperation and participation and empowerment of people at the bottom, which, in this case, is the community. According to Hood, the individualist approach holds each person accountable for his or her actions. This approach may be used effectively in governmental institutions, such as schools and initiation schools, to minimise challenges of discipline and ill-discipline. The egalitarian approach is a mode by which partnerships, accountability and control of institutions may be met. This approach may also be applied in government institutions and traditional initiation schools to curb unruly behaviour of learners and initiates. However, the modernist view focuses on critical thinking and logic. It tends to question views that are imposed from religion and the past. The integrative worldview tries to bring together and synthesise elements that are viewed as mutually exclusive in other worldviews. In this worldview, such opposing perspectives are understood on a 'deeper level' to be part of a greater whole or synthesis. De Witt (n.d.) states that:

> [*S*]uch a holistic perspective results in 'both and' rather than 'either or' thinking, which can lead to great social, cultural, economic and technological innovations. People with modern worldviews tend to emphasise rationality, science, logic and critical thinking, and they often question imposed views from [*religious*] traditions and the past. (n.p.)

To do something 'because we have always done it' is not an argument for people with modern worldviews. There are opposing views regarding the age boys should attend initiation school, which is a contributing factor in the case of discipline. However, a person should at least be mature. There is also a lack of uniformity regarding the age of initiation, and it differs from culture to culture. Our communities are urged to adapt and move with the times, as culture and traditions are diverse. These customs are not static; they continuously evolve, hence the call to move with the times and embrace changes as a collective.

■ Possible solutions to ill-discipline and discipline

Discipline in African and South African communities has always been observed and evident in our tribal courts, households and traditional institutions. This is from time immemorial, before we were colonised by Western cultures. Ocitte (as cited in Amos 2013) lists five philosophical principles, namely preparation, functionalism, communalism, perennialism and holisticism. In the context of learner and initiate discipline, firstly, with preparation, one can manage problems more quickly and more efficiently because one will already have solutions at hand ready to be implemented. Secondly, functionalism sees 'society as a structure with interrelated parts designed to meet the biological and social needs of the individuals in that society'. Thirdly, communalism is concerned with loyalty to a socio-political grouping based on religious or ethnic affiliation. Fourthly, perennialism aims are to be a closely organised and well-disciplined environment develops in learners a lifelong quest for truth. Lastly, holisticism's aims involve the whole and the bigger picture of any problem; each change you make can affect the whole. He maintains that these principles guide African indigenous education. Despite criticism directed against *'lebollo'* [circumcision] (Mohlaloka et al. 2016; Ntombana 2011), there is an upsurge of young boys attending initiation schools in post-apartheid South Africa. It is argued that this is because of the resurgence of young people's respect for traditional authority (Malisha, Maharaj & Rogan 2008). Considering the conflicting views of the influence of '*lebollo*' on the behaviour of initiates, it is important that teachers and other role players in the formal education system gain insight into traditional initiation. Ntombana (2011) writes that the Xhosa male initiation practice, as it was viewed in the past, is discussed by focusing on its impact on the initiates, its contribution to the moral upholding of values and its role in promoting the values of '*Ubuntu*'. According to Motlhankane (2014), most initiates at some initiation schools (boys to men) are beaten to a pulp in the name of disciplining them, teaching them perseverance and endurance of pain as real men. Motlhankane (2014) also agrees with the said statements. All these abusive practices pose threats to the lives of initiates, who mostly are still learners in governmental schools. These said practices are uncalled for and unlawful. Traditional initiation surgeons ('*ingcibi*', '*amakhankatha*'), initiate caretakers and community elders must act as a collective, take the lead and act harshly against individuals who practise such abuse. These forms of abuse in the name of 'discipline' must be reported to the police so that perpetrators are dealt with accordingly.

Mohlaloka et al. (2016:11) recommend that schools should join hands with traditional initiation instructors, as the formal school system and the traditional initiation school system have the same common goal, namely to 'educate learners for their adult life'. An African expression of the Yoruba of Southwestern Nigeria (cited in Murovhi et al. 2018) is '*eniyan kan lo ma nbi omo, sugbon gbogbo ara ilu lo ma nto ju won*', meaning that, although only one person is a biological parent, the entire society becomes social parents when it comes to disciplining, training and guiding the child. '*Umntu ngumntu nga bantu*' means a person is a person through others; and 'it takes a village to raise a child' ('*ngwana sejo sennye wa tlhakanelwa*'), a Setswana proverb, means that we are as a collective all responsible for disciplining and grooming our children. These expressions show that, if a community wants to instil discipline, good morals, good behaviour and good citizens, all members should work hand in hand to achieve that goal. If a family wants to have well-mannered children with good morals, each member should be committed to achieving that goal.

All elders in the community should further participate in disciplining a child. Degbey (as cited in Amos 2013) mentioned and emphasised that the dominance of community elders has a relatively high degree of social control over individuals, especially the youth. Elders, as the custodians of most of our traditional practices, should be given a platform to lead, discipline and teach our youth good morals. The Setswana proverb *le ojwa le sa le metsi* roughly means there is no period in life when right living is as pivotal as in the period of youth. This is a crucial time when every fibre of the body is elastic and can be moulded accordingly, right or wrong, forever. There is thus a dire need of careful guidance and wise, calculated supervision from elders. Mohapi (2013) adds that graduates need to be taught and made to understand that the school environment, whilst different from initiation school, supports and complements initiation school. Mohapi's recommendations emphasise the need for correlation between and collective responsibility amongst communities and all relevant stakeholders. Traditional initiation instructors, elders, parents and all other affected institutions need to foster moral character and optimal competence.

Baumrind (1997) describes *character* as that:

> [*A*]spect of personality that gives rise to accountability, is responsible for persistence in the face of hardship and inhibits impulses in the service of some more remote or other oriented goal. Character consists of positive and cultivated habits of social responsibility, moral commitment and self-discipline that provide the structure of internal law governing inner thoughts and volitions under the jurisdiction of conscience. *Competence* is translated as effective human functioning in attainment of desired and culturally valued goals. (p. 323; [*emphasis in original*])

These traits must be instilled in our initiates and learners in South African schools and the African continent.

In addition, the concept of socialisation may apply. *Socialisation* is defined as an adult-initiated process by which young persons (in this case, initiates and learners) through education, training and imitation, acquire their culture, habits and values in agreement with adaptation to that culture. Children's perspectives are shaped by understanding their parents' socialisation efforts, but their perspectives are strongly influenced by their parents' perspectives represented in adult behaviour. The disciplinary encounter is but one socialisation strategy, and the goals of socialisation are themselves limited and 'culturally determined' (Baumrind 1997:47). Disciplinary measures linked to the tradition and known by society must be applied in disciplining initiated men and women who transgress against traditional customs by means of misconduct, disrespect, disobedience, unruly behaviour and other wrongdoings.

In all African and South African cultures and traditions, when one does anything wrong, one is fined; if one does not have what is asked as a fine, one is then flogged as a form of payment for one's transgressions. This is clearly an 'other-directed' rather than a 'self-directed' take on discipline. The practice of this traditional law may curb the likelihood of one repeating any offence. In most known instances, after graduation, newly initiated men go back to school where they recruit other uninitiated boys by blocking male toilets and demanding that they pay a certain entrance fee to access toilet facilities. This is pure bullying, which is a major trait of ill-discipline and concern in learning institutions across South Africa. In Xhosa culture (‘*uyagwetywa*’), and even in Sesotho, Sepedi or Setswana cultures (‘*Wa atlholwa*’), you are given a fine for any misconduct or wrongdoing by community elders, such as ‘*dikgosi*’ [chiefs]. This practice may take place anywhere; it is not necessarily limited to the tribal court only (‘*inkundla*’, or ‘*kgotla*’ in Setswana). In Setswana culture, if one member of the regiment does something wrong, all the regiment members are fined. The reasoning behind this collective fine is ‘collective responsibility’. As brothers for life, we are supposed to reprimand each other for any wrongdoing and take care of each other. This traditional law, to our knowledge, applies in most African cultures, be it Sepedi, Sesotho, isiNdebele or Tshivenda. Moreover, traditional surgeons (‘*ingcibi*’) and traditional initiation instructors and initiate caretakers (‘*amakhankatha*’) must be experienced and guided by community elders. Traditional surgeons must be at least 45 years old; not newly graduated men who are 18 and 19 years old. These youth still need to be mentored by experienced traditional surgeons for at least a period of 10 years before they can be allowed to practise as traditional surgeons. These newly graduated men are the cause of numerous deaths of initiates, ill-disciplined behaviour, gangsterism and disobedience. All these bad moral traits breed bad learner behaviour and newly initiated men who do not embody the envisaged character traits. Traditional initiation schools must work hand in glove with the provincial government and comply with laws and policies drafted by government in partnership with chiefs (‘*amakhosi*’). This would curb bogus initiation schools that commercialise the custom, thereby attracting negative media coverage which then undermines the entire traditional initiation practice.

Schapera (2004), in the book *A handbook of Tswana Law and Custom*, concurs with this recommendation by noting that:

> [/]n the olden days, children known to be disobedient or insolent towards their elders were treated with special severity at the initiation schools, which accordingly served as a powerful disciplinary force. This exercise gave parents a sense of control to mould the behavioural patterns of their children who would act accordingly due to the fear of hardships and torture they would otherwise have to suffer when being initiated. (p. 182)

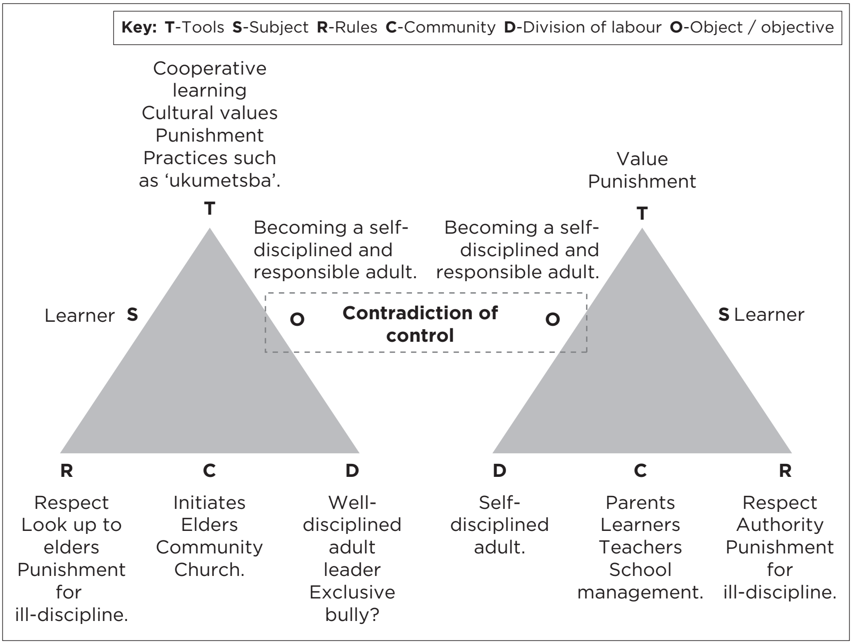
Siswana (2016) agrees that culture is indeed passed on from one generation to the next – from knowledgeable elder to a learning child. As part of the recommendations regarding discipline and morals, our societies that practise traditional initiation should check if they are passing good, respectful and reputable knowledge on to young initiates. The unruly and ill-disciplined behaviour we experience in our initiated youth and learners might be what they have copied from their elders. Amos (2013) seems to fully concur when she states that adults imitate norms and practices from older acculturated adults, and she argues that such a transmission is often through exposure and through example. She further illustrates her argument with an exceptional example of the Orangutan mother (ape) who uses a specially prepared stick to fish out food from a fissure. The ape has learnt this skill and is now teaching it to her child, who is hanging on her shoulder, intently watching. Traditional leaders, hand in hand with their respective communities, need to re-learn, re-educate, revisit and re-evaluate the true, undiluted traditional initiation customs. Social wounds caused by lack of discipline and unruly behaviour evident in the initiated youth are too deep to be healed in a short time. All affected stakeholders must work together in healing our respective societies.

Traditional initiation is a rich cultural heritage which makes us African. We should not discard it outrightly because of the said challenges. Amos (2013) highlights a statement in the Ghanaian language, which says whenever you neglect or abandon something, and later go back for it, it is never forbidden.

In Setswana we say, ‘[*m*]*aropeng go a boelwa; go sa boelweng ke teng*’, meaning you can still revisit whatever you neglected.

Studying these indigenous knowledge practices through a Cultural-Historical Activity Theory lens

Cultural-Historical Activity Theory has its roots in social constructivism and the work of Lev Vygotsky (Mentz & De Beer 2019). It is a good research lens to study complex settings, for example, education. We conclude this chapter by utilising third-generation CHAT, as conceptualised by Engeström (1987), to study discipline in terms of two interdependent but separate activity systems, namely, (1) initiation schools and (2) government schools. Engeström (1987) coined the term ‘activity system’, and he suggested that, as a minimum unit of analysis, two such activity systems should be compared. In Figure 6.1, the initiation school is described as an activity system on the left, and this is juxtaposed with the government school as activity system on the right. The ‘subject’ in both these activity systems is the learner. Many boys, after graduating from an initiation school, go back to government schools to pass Grade 12. The activity system is always geared to the achievement of an ‘object’. In the context of this chapter, the object would be a self-disciplined individual who upholds the values of society and takes moral responsibility for his or her own actions. ‘Tools’ are used to scaffold learning, or the activity, so that the ‘subject’ can achieve the ‘object’. Such tools in initiation schools might include corporal punishment, physical hardship, sleep deprivation, cultural customs, to name but a few. Furthermore, there are rules at play that govern the activity. Such rules might include cultural and religious customs, or the basic principles underpinning self-discipline. All the different stakeholders constitute the ‘community’ — for example, elders, traditional surgeons, healers and parents in the case of initiation schools; or teachers, parents and school management, in the


Key: T-Tools S-Subject R-Rules C-Community D-Division of labour O-Object / objective
Cooperative learning Cultural values Punishment Practices such as 'ukumetsba'.
T
Becoming a self-disciplined and responsible adult.
Becoming a self-disciplined and responsible adult.
Value Punishment
T
Learner S
O
Contradiction of control
O
S Learner
R
C
D
D
C
R
Respect Look up to elders Punishment for ill-discipline.
Initiates Elders Community Church.
Well-disciplined adult leader Exclusive bully?
Self-disciplined adult.
Parents Learners Teachers School management.
Respect Authority Punishment for ill-discipline.

Source: De Beer and Mentz (2017:11).

FIGURE 6.1: A third-generation Cultural-Historical Activity Theory gaze at discipline in initiation and government schools (the activity system on the left is the initiation school; on the right, the government school as activity system is illustrated).

case of government schools. The 'division of labour' refers to the different roles played by the subject in the activity system. In this case, the balance between being 'self-directed' and taking social and moral responsibility for one's own actions versus being 'other-directed' and modelling behaviour because of punishment or rewards, is of particular relevance.

It was shown earlier that many young men graduate from initiation schools with a mindset that they can dominate women and uncircumcised men. This is fuelled by 'rules' such as '*ukumetsba*' or '*ukosula*', as Thambe, the first author, knows the said term. 'Rules' and 'tools', such as corporal punishment, conflict with the intended object (or, in CHAT language, tensions exist between the nodes in the activity system). The aim is that discipline should be self-directed, but it is clear that some of the practices at initiation schools promote 'other-directedness', and this might result in actions sanctioned by either a fear for punishment, or for rewards, instead of assuming social and moral responsibilities for one's own actions.

Also, such beliefs of 'superiority' negatively impact on the behaviour of the learner in the other activity system (the government school) and might lead to undesired behaviour such as bullying or the marginalisation of the rights of women.

In a government school, a learner who graduated from an initiation school is expected to respect a male teacher, even if such a teacher did not attend a rite of passage. Similarly, a learner is expected to respect a female teacher. This juxtaposition shows how a learner, confronted with two different sets of values or worldviews, might struggle to navigate such a contested space. These dynamics might lead to a 'contradiction of control' (McNeil 2013), namely where the two objects of the activity systems (that of the initiation school and government school) are not aligned. Boys coming from 'bogus' initiation schools, where violence/ corporal punishment characterises the initiation, are likely to show aggressive behaviour in school rather than being 'self-disciplined and responsible adult[s]'.

However, initiation schools have numerous positive attributes as well, as is illustrated in the excerpt below from the autoethnography of the first author (Thambe) in which he recalls an incident whilst being an initiate at the initiation school:

> I still remember the morning of our water-drinking ceremony 'Ukosiswa' vividly, even though it's nineteen years back. We had not been drinking water and not eating any salt for seven days. *Ukosiswa* is that anticipation, that moment that, finally we are going to drink water and eat salt and meat. My late uncle, on their way to bring our goat to us, by mistake managed to let it escape, and it joined a group of other goats. They struggled getting it back, and they came to tell us that they lost the goat. I was shaking with fury, and I said they must get lost in front of me, just like the goat.

> I nearly hit my uncle with my stick. He just stood there, looked at me and said, ooh, you want to beat me, beat me, beat me and after that you must tell me who taught you that… I have given you that stick, and you think you can use it as you please? So, every time when you get angry you will beat people, you will even beat your wife and your kids? You must never, ever do that again, 'uyandiva' – (do you hear me)? Now, you go with your brother and fetch that goat, 'yeyenu ancho' – (It's yours, right?).
>
> Thirsty, hungry and angry as we were, we left, and we managed to find the goat. As we were finally eating and laughing, my uncle said, 'ungaphinde uyenze lanto, uyeva, Ungalawulwa ngomsindo, ngoba izakufak'enxakini' – (You must never think of doing that again, do you hear me, you must not be ruled by anger, it will put you in trouble). He jokingly said 'ndingu Mlungisi mna, ndizawunilungisa' – (I'm Mlungisi, just like my name, I will put you in your place nicely). I learnt an important lesson – self-control. Whenever I get angry, I think back to that incident, that taught me so much. (Thambe, autoethnography, 2020)

The CHAT diagram (Figure 6.1) dictates that, if to foster self-discipline is seen as the 'object' in the activity system, the use of tools that are 'other-directed', such as corporal punishment, should not be considered. In such an activity system, 'rules' such as care and respect should be embraced by all stakeholders in the community.

■ Conclusion

Based on the consulted sources, one is tempted to believe that a nation that abandons its culture is as good as dead. In traditional initiation, chiefs, traditional leaders and elders are the pillars of every community. They are agents of socialisation in many African societies and are still seen as key to the growth of the nation's moral fibre and discipline for our next generations. They are the ones responsible for fostering discipline through cultural ways of life – which are embedded in traditional schools – because they are leaders, elders and rulers of their communities. Members of the community listen to them and carry out their instructions willingly.

Community is the heartbeat of any society, hence the call for collective responsibility in our respective communities. The education system should grant powers to traditional leaders and community members to monitor and supervise in various schools or institutions. This would somehow attend to the problem of ill-discipline in initiated men. It should also be noted that chiefs do not rule alone; they rule together with their people. The society must not build walls between traditional leaders and communities. Traditional practices such as initiation, if well managed, can be used to help communities raise children who become disciplined and respectful members of the communities they live in. Ramadwa (2018) proposes the following solutions for teachers: familiarising oneself with the school's code of conduct; keeping record of learners' conduct in class; conducting oneself professionally at all times and keeping parents informed about learners' behaviour.

In conclusion, government, teachers, parents and learners need to work together to promote discipline in schools. Societal factors such as culture and philosophy shape education systems and issues within education systems (Mohlaloka et al. 2016). The problem of ill-disciplined behaviour in schools might be caused by a few initiates who underwent illegal initiation and were not properly taught and instructed because elders, parents and custodians of the culture were not involved. The age of initiates also has an influence. Close cooperation between schools' disciplinary committees and traditional surgeons might give uninitiated schoolteachers insight into the underlying reasons for specific unacceptable behaviour, such as initiates' unwillingness to speak to female teachers, or claims that they are men and not boys. Indigenous knowledge and traditional initiation schools do not claim to have answers to discipline problems within the education sector but suggests ways that can be integrated with modern methods to remedy the problem. Critical thought is also needed on whether some of the practices at initiation schools are not fuelling gender-based disrespect and violence.

Mohapi (2013) agrees that schools have no power to refuse learners to be part of their cultural practices; this calls for collective responsibility between all stakeholders, particularly the community. Furthermore, Mohapi in her study on Ndebele culture revealed that, when Ndebele parents are called for school meetings, they do not attend in comparison with other community members in their cultural practices.

It can be concluded that cultural practices, such as traditional initiation of both boys and girls, have an impact on learner and school discipline. As a collective, we must go back to basics to observe where we have lost our customs' track on discipline. We should revisit and do self-introspection. Collectively, we must continue to look for new cultural answers to the moral decay and ill-discipline behaviour in our initiated youth. In isiXhosa, we say '[*a*]*kulahlwa mbeleko ngaku felwa*' ['do not throw the baby out with the bathwater'].

Chapter 7

Educator indiscipline and school dysfunctionality: Underperforming rural schools of the North West province

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Abstract

In this chapter, we discuss the findings of a phenomenological study about educator indiscipline at underperforming schools in rural areas of the North West province, South Africa. The aim of the study was to determine the perceptions, opinions and lived experiences of participants at purposefully selected public schools. The findings revealed that educator indiscipline has a detrimental effect on the discipline of learners and the overall functionality of the schools. Educator indiscipline is a contributory factor resulting in the 'dysfunctional equilibrium phenomenon' of trapped or ineffective schools. Incidences of educator misconduct were not appropriately managed, and educators who displayed indiscipline were not held to account. Some perfunctory reasons for not addressing educator indiscipline include the misapplication of the idea of *Ubuntu,* the misuse of tribal hierarchies to shield educator incompetence, poor knowledge of education law amongst educators and school leaders, and inappropriate union protection of undisciplined educators.

Introduction

Whilst research on indiscipline at schools generally tends to focus on learner behaviour, very few studies have focused on the nexus between educator misbehaviour and its effect on school discipline and functionality. Oosthuizen (2006:25) found that competent educators who are well-prepared and have good subject knowledge tend to have fewer problems with the maintenance of learner discipline in the classroom. On the other hand, educators who come ill-prepared, have poor subject knowledge or are lazy to do their duty tend to have more frequent and serious learner discipline problems (Oosthuizen 2006). Van Wyk (2001:195) found that educator misconduct was seriously hampering the culture of learning and teaching in schools. Chikamhi (2006:2) maintains that educator conduct during both official and unofficial times should be appropriate and that professional standards as well as the general value of education will likely be lowered by educator misconduct. Smit and Rossouw (as cited in Russo, Oosthuizen & Wolhuter 2015:140) are of the opinion that, when education leaders and educators regularly display indiscipline or defy the law, it is to be expected that learners will imitate the examples and be drawn into various of forms of misconduct. Educator indiscipline and misconduct are not unique to South Africa but is a worldwide phenomenon (Botha 2006:341; Brady & Tajalli 2018:62–80; Martin 2005:20; Say 2010:1).

In the light of the above, the aims of this chapter are as follows: firstly, to review the literature on, and legal principles of educator misconduct and indiscipline; secondly, to report on the findings of a phenomenological study about educator indiscipline in underperforming schools in rural areas of the North West province; and finally, to conclude with a discussion and recommendations.

Problem statement

Educators have a profound effect on the lives of learners, and the power imbalance present in this relationship may have a long-term influence on learners (Knoll 2010:371; Lunenberg, Korthagen & Swennen 2007:586). Between 2011 and 2019, an average of 506 complaints per year have been laid against educators at the South African Council for Educators (SACE 2011–2019). SACE (2012:31) reports that most of the cases of misconduct reported to the Council come from the provinces with major metropolitan areas, namely KwaZulu-Natal, Gauteng and the Western Cape. This is understandable because metropolitan areas have more educators than less-populated areas. Professional misconduct encompasses the personal and professional standards of behaviour expected of professionals. Table 7.1 provides statistical information about the categories and number of misconduct

TABLE 7.1: Misconduct cases reported to the South African Council for Educators.

Categories	**Number of cases**					
	2011	**2012**	**2013**	**2014**	**2015**	**2016**
Verbal abuse, harassment and defamation	79	83	98	89	86	113
Sexual misconduct, including rape	126	104	82	97	92	99
Fraud, theft and financial mismanagement	58	65	42	40	34	52
Corporal punishment and assault	174	182	202	267	193	265
Unprofessional conduct, alcohol abuse, absenteeism and insubordination	69	115	146	113	95	122
Total	**525**	**556**	**582**	**593**	**561**	**593**

Source: SACE Annual Reports (2012, 2013, 2014, 2015).

cases reported to SACE during the 2011–2018 financial years. Since 2011, there has been an increase in the number of complaints involving corporal punishment by educators (Table 7.1). Furthermore, the reports reveal that men are more likely to be accused of misconduct than women; the largest proportion of offenders is between the ages of 35 and 54; and the largest proportion of cases involves professional misconduct, followed by assault.

The main forms of complaints about serious misconduct by educators are instances of corporal punishment (assault), unprofessional conduct, verbal abuse and harassment, sexual misconduct and harassment, and fraud or theft, amongst others (SACE 2011–2016). The SACE cases of guilty verdicts of educator misconduct over the past six years indicate a fairly consistent number of matters, with some fluctuation. However, it is noticeable that the number of cases involving unprofessional conduct and unlawful use of corporal punishment shows an increasing tendency. Misconduct by educators – especially sexual misconduct – has been getting increased scrutiny from the media and the courts (Knoll 2010:371–386). Educator misconduct has also given rise to several court cases on matters such as absence without permission (*Phenithi v Minister of Education* 2005), receiving compensation for work done during school hours (*Van der Walt* *v MEC for Education, Gauteng* 2004), statutory rape of a female learner (*NEHAWU obo Matsha v Dept of Social Services* 2007), theft of a learner's cell phone (*Despatch High School v The Head of the Department of Education, Eastern Cape* 2003) and molesting a female learner (*S v Mohlakane* 1993).

A study by the Human Sciences Research Council found that 'a conservative, optimistic leave rate of educators in South Africa is between 10% and 12%', which amounts to 20 to 24 days per year for the average teacher (Reddy et al. 2010:84). A 2009 study observing 58 schools in North West concluded that 'teachers did not teach 60% of the lessons they were scheduled to teach' in the year (Carnoy, Chisholm & Chilisa 2012:xvi; Carnoy et al. 2011). The former Director-General of the Department of Basic Education (DBE) admitted that, although a generation of policies and laws to govern education had been set in place, numerous interventions increased financial investment and provision of more resources for schools, and new reforms by the national and provincial DBE had been undertaken since 1994, these departmental initiatives had been met with stubborn unresponsiveness and poor system performance (Soobramoney 2012). Based on a survey conducted by the national DBE, Minister Motshekga commented that 'teacher discipline was lacking' and that 'absenteeism and a poor work ethic are of the main causes of the dysfunctionality in schools' (DBE 2013b). She confirmed that 'on average educators teach only 3.5 hours per day instead of 7 hours' in public schools (DBE 2013a).

Educator misconduct is not limited to individuals, as indiscipline and misconduct permeate the education system. According to Taylor, the underlying reasons for the persistent dysfunctionality of the South African school system are primarily caused by two factors, namely the weak capacity and incompetence of many teachers, principals and system-level officials, and a culture of patronage which permeates almost all areas of the civil service and education departments (Spaull 2016). The Volmink report ('Jobs-for-cash report') found that the DBE was at the mercy of SADTU, which was involved in the widespread illicit sale of posts and appointment of educators in six provinces (Volmink et al. 2016).

A review of literature affirms that research has been conducted on educator discipline and misconduct; however, the nexus between indiscipline of educators and school dysfunctionality has not received specific attention. This research addressed this issue to some extent.

Research design and methodology

The main objective of this research was to determine the effect and influence of educator indiscipline on the functionality of public schools in the rural areas of the North West province.

This was a qualitative, phenomenological study based on the interpretivist paradigm. The research was undertaken to investigate the lived experiences, perceptions and opinions of purposefully selected participants on the matters of educator indiscipline and school functionality.

Phenomenological study

We decided to undertake qualitative research because of the complexity of the phenomenon and the interrelationship between educator misconduct and school dysfunctionality (Mans 2014). The aim of this interpretivist research is to gather data on perspectives of a situation, analyse the data and provide insight into how one's participants make sense of the phenomenon (Nieuwenhuis 2016:60). The data in this study were collected by means of semi-structured interviews with a non-random sample of purposefully selected participants (Leedy & Ormrod 2011:139).

Study population and sampling

The study population comprised all the educators and principals of all the public schools in the Maquassi Hills area (Mans 2014:18, 94–96). The Maquassi Hills area includes two Afrikaans and

13 English secondary schools, three Afrikaans and 35 English primary schools, and 998 teachers in total (A.J. Engelbrecht pers. comm., 2012). After consultation with the North West Department of Education to obtain permission to do the research and identify the underperforming public schools in the area, participants (i.e. educators and school principals) were purposefully selected from three underperforming primary and three underperforming secondary schools. Underperforming schools are per definition schools with a less than 50% pass rate for learners (Mans 2014:18, 94–96). The selection criteria for the schools and participants were: existing or previously reported incidences of educator misconduct; minimum of three years teaching experience; experience of the effects of educator indiscipline and public schools falling in the underperforming category (Mans 2014:18). By purposefully selecting a non-random sample of participants, the aim was to seek varied perspectives that were most likely to provide rich, deep qualitative data that addressed the pertinent issues (Maree 2010:90–91). This methodology is also utilised by Smit in the collected work entitled *A scholarly inquiry into disciplinary practices in educational institutions*, edited by C.B. Zulu, I.J. Oosthuizen & C.C. Wolhuter (see Smit 2019:146): ‘Pre-research telephone enquiries were made at potential schools to identify possible participants’ based on the ‘selection criteria’ (94–96). Leedy and Ormrod (2011:144) suggest purposeful sampling of between 5 and 25 individuals in a phenomenological study, and the researcher conducted interviews with 11 individual participants until a level of saturation was achieved (Leedy & Ormrod 2011:145). An interview schedule was used to direct the content of the ‘semi-structured interviews’ (Merriam 2008:72).

Data analysis

The method of analysis and evaluation of the qualitative data is largely interpretative (Leedy & Ormrod 2011:150). After transcribing the interviews, the data were grouped into general categories and themes (Mans 2014:98–99). The process of data analysis begins with the categorisation and organisation of data in search of patterns, critical themes and meanings that emerge from the data (Lindlof & Taylor 2010:317). Leedy and Ormrod (2011:140) explain that the central task during data analysis is to identify common themes in the participants' description of their experiences of the phenomenon. Interviews were conducted in English, digitally recorded and transcribed verbatim (Mans 2014:98–99). The transcripts were reviewed by each participant, and inaccuracies or errors were amended. The researcher augmented the interviews with field notes on non-verbal communications (Merriam 2008:113). Statements, divergent perspectives and different experiences shedding light on educator indiscipline and dysfunctionality of schools were analysed, categorised, evaluated and synthesised into meaningful units (Leedy & Ormrod 2011:150; Mans 2014:98–99). The process of analysis of the qualitative data involved consolidation, reduction and interpretation using open coding, axial coding and selective coding methods to arrive at common categories and themes (Mans 2014:98–99; Maree 2010:105–109).

Trustworthiness and credibility of the research

Trustworthiness in qualitative research may be enhanced by using multiple data sources, member-checking the raw data and ensuring the confidentiality or anonymity of participants (Nieuwenhuis 2016:113–115). In order to enhance the trustworthiness (consistency of a measure) and credibility of the method (i.e. the instrument [interviews] measures what it is supposed to measure), verbatim accounts in the participants' language and mechanical recording of data and member-checking were applied (McMillan & Schumacher 2014:408). Additional measures to ensure trustworthiness, as suggested by Nieuwenhuis (2016:113–115), are to keep notes of research decisions taken; to ask an independent coder to code some of the data to compare with the researcher's coded data; to have participants verify and validate findings; to control for researcher bias; to avoid generalisation across a population and by stating the limitations of the study upfront in order to help readers understand how conclusions were drawn (Mans 2014:96). The trustworthiness of this study was enhanced by clarifying the researcher's theoretical orientation, assumptions and views before commencing the research. During the interviews, the participants were assured of confidentiality and voluntary participation and their answers were frequently rephrased to eliminate possible misinterpretation. A transcription of the interview was given to each participant for content verification.

Ethical considerations

Prior to the data collection, ethical clearance was obtained from the ethics committee of the North-West University (NWU) (Mans 2014:97). The study was based on the ethical principles of (Mans 2014:97):

1. informed consent – participants were fully informed and understood the purpose, terms and implications of the research
2. voluntary participation or withdrawal
3. protection of participants from harm
4. confidentiality and nondisclosure of participants' identity
5. protection of privacy
6. truthful recording of data
7. respectful interaction with participants
8. safe and secure storage and archiving of data.

Before the data collection began, consent and permission were obtained from the provincial Department of Education, the schools and the respective participants (Mans 2014:97). This study was conducted in accordance with the NWU's Policy on Research Ethics (NWU n.d.). All participants were assured of confidentiality and they, in turn, gave written consent to participate (Mans 2014:97).

Literature review: Educator indiscipline, school dysfunctionality and the law

The definitions, legal principles and the key concepts of the research are explained in the following paragraphs.

The duties and responsibilities of educators

The *Employment of Educators Act* (RSA 1998) is the main statute that regulates labour relations in education (Liwane-Mazengwe 2012:146). The purpose of the *Employment of Educators Act* is 'to provide for the employment of educators by the state, for the regulation of the conditions of service, discipline, retirement and discharge of educators and for matters connected therewith' (RSA 1998). The core duties and responsibilities of school-based educators, based on the different post levels, are clearly stipulated in items 4.2 to 4.5 of the Personnel Administrative Measures (PAM) (RSA 2003), which is part of the *Employment of Educators Act*. PAM explains the parameters of service, workloads, duties and responsibilities, manner of appointment, service benefits and grievance procedures (Liwane-Mazengwe 2012:151). School-based educators must account for 1800 actual working hours per annum and are expected to be at school for a minimum of 7 h per day, including breaks and periods when the learners are not in class (RSA 2003:Item 4.2). Educators are obliged to perform the following core duties: scheduled teaching time; relief teaching; pastoral duties like ground supervision, detention and scholar patrol; administration; supervisory and management duties; extracurricular and co-curricular activities, planning, preparation and evaluation; professional duties like workshops, meetings or seminars; and professional development. Item 3.2 (c) of PAM (RSA 1998) clearly states that none of these core duties may 'diminish the overall amount of scheduled teaching time or negatively impact upon the curriculum'. Generally, Post Level 1 educators are expected to teach between 85% and 92%, deputy principals (Post Level 2–3) should teach 60% and principals

(Post Level 3–4) should teach between 5% and 10% of the scheduled teaching time, depending on the post level, the size of the school and whether it is a primary or secondary school.

The employment relationship between the employer (be it the state or a school governing body) and the employee (educator) is subject to labour law principles in which the employer exercises authority over the employee (Beckmann 2006:430). Various other statutes, including the South African Constitution (RSA 1996a), the *Labour Relations Act* (RSA 1994), the *South African Council for Educators Act* (RSA 2000) and the *South African Schools Act* (RSA 1996b) contain provisions that regulate employment relationships to a further extent. In addition, common law principles, such as the *in loco parentis* duties of educators who have children under their care, the *ultra vires* doctrine and the rules of natural justice, apply to educators in the employment relationship (ed. Oosthuizen 2019).

☐ Educator misconduct, indiscipline and incompetence

Educator misconduct refers to an infringement of duties, committing a transgression or a breach of the relationship between the employer and employee (Mothemane 2003:31). Section 17 of the *Employment of Educators Act* (RSA 1998) lists the serious forms of misconduct and stipulates that educators must be dismissed if they are found guilty of committing such an act. Deeds listed as dismissible offences include theft, bribery, examination fraud, sexual assault, sexual relations with a learner, possession of illegal, intoxicating or stupefying substances as well as causing a learner to commit any of these deeds. The disciplinary action in such cases of serious misconduct is not delegated to principals, and officials from the Department of Education should be involved right from the start of the informal phase of a disciplinary case (Rossouw 2010:174). Section 18 of the *Employment of Educators Act* (RSA 1998) lists the forms of misconduct which are regarded as conduct or omissions of less serious nature. These may be categorised under property and finances; criticism of employer or institution; misuse of position to promote certain interests; poor work performance; improper behaviour; disregarding safety regulations; dishonesty; and refusing counselling or rehabilitation (Rossouw 2010:172).

Principals have the delegated power to handle cases like the following: wrongful possession of school property; operating money-lending schemes from school property; disobeying safety regulations; endangering the lives of self or others; unjustifiable prejudices against the school or Department; misuse of position to benefit someone else; absent without a reason; poor work performance for reasons other than incapacity; sleeping on duty; failing to carry out lawful orders; unacceptable conduct whilst on duty; inciting other personnel to unacceptable conduct; displaying disrespect; or intimidation or victimising of colleagues (Mans 2014:40, 78). Cases where departmental officials should also be involved from the start of the informal phase are matters pertaining to mismanagement of school finances; intentional damage to school property; accepting money from others for doing their duty; intoxicated whilst on duty; unfairly discriminating against another person; assaulting another person; victimising another person; carrying firearms or dangerous weapons on state premises; giving false statements or evidence in the execution of one’s duties; and failing or refusing to undergo counselling, medical examination or rehabilitation (Mans 2014:58–61; Rossouw 2010:174). The South African Council for Educators classifies educator misconduct into six main categories, and these categories form the basis for the explanation concerning the nature and occurrence of educator misconduct. Unacceptable conduct during strikes as well as toxic personalities and the bad apple effect are grey areas of misconduct (SACE 2016:30).

Indiscipline is not defined in the *Employment of Educators Act* but could entail any conduct or omission of non-compliance with employment standards and norms, contravention of school rules and management instructions, and failure to perform core duties without having a justifiable reason (Mans 2014:68). Examples of indiscipline (which do not necessarily amount to committing a listed form of misconduct) are: poor work ethic; failure to prepare lessons timeously; laziness and tardiness (late-coming); non-attendance or absence from class during scheduled teaching periods; failure to prepare assignments, classroom activities, examination papers and assessment activities; failure to mark, assess and evaluate activities, assignments and examination answers timeously; failure to perform administrative duties; failure to communicate with learners, parents, school management and other members of the school community; non-performance of extracurricular duties; and failure to attend workshops and continuous professional development opportunities (Mans 2014:68–82). In essence, indiscipline in the workplace occurs when an employee (educator) displays intentional or negligent incompetence or deficient compliance with performance standards, an unwillingness to improve poor work performance or if the employee (educator) is at fault in the dereliction of duties (Grogan 2017:301–302). It should be borne in mind that misconduct by educators could include common law offences such as fraud, assault and theft as well as statutory offences such as unlawfully exposing children to pornography in contravention of the *Criminal Law (Sexual Offences and Related Matters) Amendment Act* (RSA 2007). In terms of Section 18(1)(dd) of the *Employment of Educators Act*, an educator commits misconduct if he or she commits a common law of statutory offence.

☐ Procedures when dealing with educator incompetence or medical incapacity

Employers have the right to maintain workplace discipline, to require reasonable proficiency or work performance and can expect employees to carry out reasonable and legitimate instructions (Grogan 2017:149). An employer may discipline employees that have committed acts of misconduct (Rossouw 2010:157). When disciplining educators, the employer must follow a fair process (Grogan 2017:162). Different procedures have been established to deal with various situations or circumstances that may involve incompetence (RSA 1998:Schedule 1A), medical incapacity (RSA 1998:Schedule 1B), misconduct or operational requirements (Grogan 2017:162; Rossouw 2010:158). Schedule 1 of the *Employment of Educators Act* provides the correct procedures to be followed in matters of employee incompetence or incapacity, that is, in cases where no instances of misconduct were committed but where poor work performance or other forms of indiscipline occur (Rossouw 2010:251). An educator may demonstrate an inability to perform his or her duties satisfactorily because of inexperience, unsuitability, incompatibility or automation (Grogan 2017:301–305). Unsuitability refers to the character or temperament of the person, incompatibility has to do with the fact that a person does not fit into the working environment or relates poorly to colleagues, and automation refers to technological change that may result in experienced educators finding themselves incompetent to perform effectively because they did not keep up with the rapid technological changes in their subjects or the school setting (Rossouw 2010:157).

Incapacity as a result of poor work performance (incompetence) and incapacity on grounds of ill health and injury (medical incapacity) are akin because both are not species of misconduct (i.e. non-disciplinary by nature). However, the approach and procedures to matters of incompetence vis-à-vis medical incapacity differ (Rossouw 2010:159). During an evaluation of an educator's work performance, the Incapacity Code and Procedure for Poor Work Performance (Schedule 1A of the *Employment of Educators Act*) applies, and the educator must be given reasonable time to prepare and respond and should be evaluated with more tolerance if the employee is a novice or an inexperienced educator (Rossouw 2010:155). If the educator has been found wanting, then he or she should be given a reasonable opportunity to undergo a programme designed to improve competence, such as receiving appropriate training, mentoring or counselling within a reasonable time frame (Grogan 2017:301–303). If the educator still does not meet the required standards after a reasonable opportunity has been granted to improve, then the employer may transfer, demote, suspend or dismiss the educator (Rossouw 2010:158). It is thus clear that, under circumstances of incompetence or poor work performance, a school principal must address the situation by communicating with the educator and by providing the educator with a reasonable opportunity to improve performance.

☐ Disciplinary procedures in dealing with educator misconduct

The Disciplinary Code and Procedures for Educators of the *Employment of Educators Act* (RSA 1998:Schedule 2) is based upon The Code of Good Practice: Dismissal of the *Labour Relations Act* (LRA) (RSA 1994), which has been formulated to provide for fair procedures during a dismissal (Rossouw 2010:174). Schedule 2 of the *Employment of Educators Act* is specifically applicable to the educator as employee in his or her relationship with the employer and ensures that a fair procedure is followed during disciplinary actions.

Article 4(1) of Schedule 2 of the *Employment of Educators Act* provides that principals should take the initial steps in the disciplinary process because the application of discipline and the exercising of authority over their staff members are important elements of a principal’s managerial duties (Rossouw 2010:124). For less serious types of misconduct, an informal disciplinary procedure in the form of a meeting with the principal takes place. Sanctions for informal phase misconduct range from verbal warnings to a final written warning by the principal before more serious steps are taken (Rossouw 2010:148). In cases of graver forms of misconduct, a formal inquiry process, not delegated to principals, may be followed (Rossouw 2010:176). According to

Rossouw (2010:147), a corrective approach for employers is prescribed in Section 8 of the LRA, whereby efforts must be made to correct the employee’s behaviour through a system of graduated disciplinary measures such as counselling and warnings. Schedule 2 of the *Employment of Educators Act* echoes the principle of progressive discipline.

☐ Dysfunctional schools

The term ‘dysfunctional’ is defined as ‘not operating normally or properly’ (Lexico n.d.a:n.p.). By contrast, ‘functional’ is defined as ‘working’ or ‘in operation’ (Lexico n.d.b:n.p.). Bipath (2002:12) defines dysfunctional schools as those schools where a breakdown of learning and teaching is evident. The breakdown of learning and teaching is a result of ineffective teaching, inadequate resources and infrastructure, mismanagement or disruption in the school community. On the other hand, Bipath defines a functional school as an effective school that accomplishes what it sets out to do. A high incidence of dysfunctionality in poor and disrupted communities, such as rural townships, was identified by Bipath.

In a school situation, equilibrium is reached when, for example, standards-based instruction and curricular innovation and creativity and independence are in balance (Scallion 2010:28). According to Brown (2004), schools develop an equilibrium that both stabilises them and also makes them resistant to change because they are faced with multiple tasks and complexities. The development of this state of equilibrium is linked to a school’s culture, which, according to Peterson and Deal (2009:28), encompasses a set of informal expectations and values that shape how people feel, think and act in a school. Over time, however, some schools become unproductive because of a fragmented staff who are negative and hopeless (Peterson & Deal 2009:29).

Findings of the phenomenological study: Perceptions and experiences of educators regarding indiscipline and school dysfunctionality

The participants' responses provided qualitative data about their lived experiences, perceptions and opinions of educator misconduct at the selected dysfunctional schools (Mans 2014). Perceptions of the work ethic of colleagues and educators in general, the competence and capacity of educators, the involvement of unions, departmental measures like the Annual National Assessment (ANA), Integrated Quality Management System (IQMS) and Annual Teachers' Awards were investigated to determine whether they might give rise to educator misconduct or possibly have an influence on school dysfunctionality (Mans 2014).

Poor work ethic, indiscipline and misconduct

Although infrequent incidences of serious misconduct do occur, the most common kinds of misconduct in schools – and to which all participants admitted – are educators who are unprepared for lessons, educators who do not attend classes, educators who are absent from work and instances where corporal punishment is still being administered (Mans 2014:103, H8:l. 260,H10:l. 301, P1:l. 378, DO13:l. 152, DO14:l. 163, DP15:l. 236, E1:l. 72, E2:l. 134; E3 l. 111, E4:l. 122, E5:l. 169). It was clear that a high incidence of educator indiscipline and misconduct prevails; one participant said, 'there are educators committing misconduct in every school, every day' (Mans 2014:n.p., DO14:l. 52).

Other kinds of misconduct that were experienced regularly were late-coming (tardiness/non-punctuality), drunkenness (intoxication at work) and absenteeism (Mans 2014:103, H8:l. 260, DO13:l. 152, DO14:l. 163). Some incompetence and verbal abuse as well as rare cases of examination fraud and sexual relationships between educators and learners were also reported. A kind of conduct, which is seemingly innocent but might have dire consequences, is that educators do not observe the Language of Learning and Teaching (LoLT) of the school. It was reported to happen frequently that educators, especially in English-medium schools, do not teach their classes in English but rather in the learners' mother tongue, usually Setswana (Mans 2014:100–101, E5:l. 170). Consequently, when tests and examinations are written, learners are not able to interpret or satisfactorily answer the question paper. Some participants ascribed the low marks that learners score during the ANA to the use of Setswana instead of English as medium of instruction (Mans 2014:103).

Understanding the meaning of educator misconduct

All participants were aware of what educator misconduct entails and could give their own definition thereof, such as '[a]ny conduct by educators that leads to the non-delivery of quality education' (Mans 2014:99, DO14:l. 337), or '[c]onduct that is not in line with the Code of Conduct' (Mans 2014:99, P1:l. 127) or '[a]nything an educator does that negatively influences the system' (Mans 2014:99, H8:l. 94). Participants could also cite some examples of misconduct, but – corresponding to the findings on levels of law knowledge – no one could identify the Act in which the misconduct is described. Only one participant (Mans 2014:99, P6:l. 127) was aware that sanctions are prescribed in Schedules 1 and 2 (of the *Employment of Educators Act*) but could not distinguish between the two schedules or explain when they should be applied (Mans 2014:99). A few participants highlighted the Quality Learning and Teaching Campaign, which aims at having '[e]very teacher on time, in class, teaching, with a textbook in front of every learner' as an important guideline (Mans 2014:99, P1:l. 180; H10:l. 190; DO13:l. 474).

Levels of knowledge of education law

Although most of the participants could identify the Constitution as the supreme law of South Africa and could cite the name of at least one education-specific act, the levels of knowledge of applicable education law principles amongst educators – according to the participants' own admissions – are extremely low (Mans 2014:99). A few participants previously attended courses aimed at improving their legal knowledge, but they still admitted to low levels of knowledge, because 'people will not study unless they are forced to' (Mans 2014:99).

Some participants admitted that they were aware that educator misconduct is described and regulated by law but that they were 'not interested enough to take the book and read' (Mans 2014:99). Some participants ascribed the low levels of legal knowledge to educators who decidedly do not want to obtain legal knowledge to 'play the innocence card' (Mans 2014:99, DO13:l. 40), thinking that they might get off scot free when feigning ignorance. A number of participants believed laws might be interpreted in a subjective manner by disciplinary officers, thus resulting in inconsistent application thereof (Mans 2014:99). Further investigation revealed that these participants experienced that cultural differences play a role in the application of the law as well as in service delivery in the workplace. Cultural differences allude to the attitudes, values and approaches of white educators compared to African educators (Mans 2014: 100–103). Two issues that came emerged as a result of these interview questions were the cultural matters of *Ubuntu* and the tribal hierarchy system.

Ubuntu, unconditional compassion and justice for victims

Ubuntu was cited to have an influence on the general conduct of people as well as in the application of legal measures in cases of misconduct (Mans 2014:100, H8:l. 286). *Ubuntu* can best be described as an African philosophy that places emphasis on 'being self through others'. It is a form of humanism which can be expressed in the phrases 'I am because of who we all are' and '*Ubuntu ngumuntu ngabantu*' in the Zulu language (translation: a person is a human or person through people/persons) (Mboti 2015:125). The term *Ubuntu* is often used in a more philosophical sense to mean 'the belief in a universal bond of sharing that connects all humanity' (Gade 2011:303). The Constitutional Court referred to the word *Ubuntu* and stated that it entailed 'a deliberate choice, preferring understanding over vengeance, reparation over retaliation, *Ubuntu* over victimization' (*Azanian People's Organization (AZAPO) v President of the Republic of South Africa* 1996:para. 19). Gade (2012:488) researched the deeper meanings and various understandings of *Ubuntu* as a moral quality or as a phenomenon, like a worldview or an ethic of African humanism. Gade (2012:490–498) found that *Ubuntu* included notions of humaneness, capacity to forgive, not holding to account, not shaming another because we are all fallible humans, acting with humanity and humility like a 'human', not dehumanising others, and treating other with respect and dignity based on the solidarity principle of unconditional group compassion.

However, some understandings of *Ubuntu* have negative connotations and harmful outcomes. In particular, the meaning that some South Africans of African descent (SAAD) attach to *Ubuntu* is that only black Africans are humans that have *Ubuntu* and that white people do not or cannot have *Ubuntu* because they do not have unconditional compassion for black Africans (Gade 2012:494, 496, 499). However, Gade (2012:500) concludes and is of the opinion that SAAD's understanding is illegitimate as most Africans regard all humans, irrespective of race or colour, as humans who can have *Ubuntu*.

Some participants explained that, in their opinion, legal measures and disciplinary procedures are not always interpreted or applied correctly, because *Ubuntu* is not observed by the disciplinary committee or principal and the tribal hierarchy system is not respected (Mans 2014:100). The participants did not all have the exact same understanding of the word or philosophy of *Ubuntu*. One participant described *Ubuntu* as an African word that entails the showing of respect towards others (Mans 2014:100, H8:l. 282). According to another participant, the role that *Ubuntu* plays will not always be the same but will differ from case to case, depending on the situation (Mans 2014:100).

A hypothetical thought experiment was posed to the participants – such as a situation where a male teacher comes to the school intoxicated – and the participants were asked to explain how *Ubuntu* would apply in such a situation. According to some participants, the intoxicated educator would be sent home with a warning to remove him or her from the learners and prevent him or her from causing harm (Mans 2014:100). Such a person would then be allowed the opportunity to explain himself or herself the next day. In this way, the teacher would be saved from the embarrassment of being engaged whilst still under the influence. In this case, then, *Ubuntu* would come in the form of 'buying time' to reconsider his or her actions. One participant admitted that *Ubuntu* could be misinterpreted and that people would not feel the need to change 'because they are treated with kid gloves the first time around' (Mans 2014:100, H8:l. 293), thus leading to the inappropriate protection of dysfunctional or undisciplined educators. The participants were of the opinion that, if *Ubuntu* did not play a role in disciplinary matters, educators and schools would be more disciplined (Mans 2014:100).

The question arises whether *Ubuntu* is not frequently misinterpreted, misapplied or even used as an excuse not to act against perpetrators. In essence, *Ubuntu* acknowledges both the rights and the responsibilities of every citizen in promoting the well-being of individuals and society (Chaplin 2006); but in cases such as the hypothetical situation above, the individual infringed the rules by being intoxicated at the workplace – this, in a sense, would not be practising *Ubuntu* towards the learners, fellow educators or parent community. It seems that the notion of *Ubuntu* that unconditional compassion and the capacity to forgive does not accord with the legal notion of justice towards those that were harmed as a result of the misconduct or undisciplined conduct of a perpetrator. The concept of *Ubuntu* has different interpretations in different environments. Some scholars refer to the 'dark side of *Ubuntu*' because insiders distinguish and treat outsiders differently (Louw 2010:5–7).

The tribal hierarchy system

Even though the tribal system in the different black cultures is not as evident nowadays as it might have been a few years ago, it still exists and the hierarchy is observed by all members of the tribe regardless of where they are. This became evident when a participant reacted affirmatively to a question regarding cultural differences influencing the application of the law (Mans 2014:101, DO14:l. 156). He then explained that he was aware of a situation where some staff members belonged to the same cultural tribe, where one is a royal prince and the other an ordinary citizen. Thus, as far as the tribal hierarchy is concerned, the prince is the superior of the citizen (Mans 2014:101). In the workplace, though, should the roles be switched, and the citizen is the senior of the prince, the prince should be held accountable for his work performance by the citizen. Because their tribal bonds have such a strong influence on their relationship, it results in the citizen not feeling comfortable to hold the prince accountable and not applying disciplinary measures for fear of retributive actions from the prince (Mans 2014:101, DO14:l. 257). Thus, the tribal hierarchy system impacts on the application of the law in the sense that the social standing of persons in senior positions would be such an important factor to them that it would influence them to rather let their subordinates go scot free than holding them accountable for their deeds and running the risk of transgressing social protocol, facing subsequent social retribution (Mans 2014:101).

Another participant remarked that culture differences also play a key role in the interpretation and application of laws (Mans 2014:101, DO13:l. 125). He believed that some issues of misconduct were not really a matter of people being ill-disciplined but rather a matter of knowing, understanding and respecting each other's culture (Mans 2014:101, DO13:l. 134). For example, when an educator from an Afrikaans or English background was absent for a few days, his or her colleagues would show their concern by enquiring as to his or her whereabouts. In many black cultures, though, it is considered an insult to ask an educator why he or she was absent for a period of time. This is because the absence might have been of a personal nature and that he or she did not want to reveal the detail but is now 'put on the spot' and forced to reveal the reasons. Legal procedures, however, require managers to collect as much evidence and information as possible, including details concerning periods of absence. Many black school principals, thus, find themselves in situations where their cultural backgrounds conflict with their workplace requirements (Mans 2014:101, DO14:l. 157).

Integrated Quality Management System: False evaluations of educators

What is concerning, however, is that all participants admitted to what can be termed as misconduct during the IQMS process: The prescribed procedure was not followed in any of the visited schools – and this is, according to all participants, a general occurrence, even in schools that were not part of the study (Mans 2014:103). The IQMS was described as '[a] manipulated, false evaluation that creates tension' (Mans 2014:103, P1:l. 411), '[a] good thing on paper that doesn't work in practice' (H10:l. 340), '[a] good idea gone wrong' (DO14:l. 417) or '[a] process that never produced the result it intended' (H8:l. 209). The main reason for the manipulation of the IQMS process is generally ascribed to the monetary incentive of 1% pay progression connected thereto (Mans 2014:103). 'You know the character of a person when money is involved' (Mans 2014:103, DO13:l. 463) was an expression used to attempt an explanation. The huge amount of paperwork involved (Mans 2014:103, E5:l. 493, E9:l. 327, DP15:l. 341) and the amount of time it consumes were also cited as reasons for committing procedural misconduct, which ranged from evaluation meetings not observed to class visits not being conducted and the inflation of the marks allocated to the evaluee (Mans 2014:103).

Abuse of sick leave

The misuse of sick leave is another kind of misconduct that takes place quite often but is rather difficult to control. Participants declared that sick notes could be 'bought' from some doctors (Mans 2014:104, H10:l. 162, DO14:l. 370), which results in educators taking sick leave and being absent from school, whilst they are actually not sick. It was described as 'a very big problem, because some of the medical doctors and traditional doctors are not always honest concerning their findings when they provide a teacher with a sick note – it is easily obtainable for R150' (Mans 2014:104, DO14:l. 371). To combat this kind of misconduct will foreseeably be an enormous problem because educators simply stay away from school and submit the sick note on their return.

Toxic personalities and the bad apple effect – Dysfunctional equilibrium

The 'contagiousness' of educator indiscipline was another dimension of indiscipline or misconduct that participants reported. This was expressed as '[o]ne bad apple will make the whole batch go bad' (Mans 2014:104, DO13:l. 282), or '[p]eople will copy bad things because they are easily influenced' (DP3:l. 241) and nearly all participants reported such incidences. Kusy and Holloway (2009) describe such working conditions and situations in the book *Toxic workplace!: Managing toxic personalities and their systems of power*. Kusy and Holloway

(2009:4) define a 'toxic personality' as anyone who demonstrates a pattern of counterproductive work behaviours that debilitate individuals, teams and even organisations over the long term.

In this study, participants experienced incidences of toxic personalities and a toxic workplace in the academic programme of schools as well as the extracurricular level. Examples were cited of educators arriving late at school in the mornings, not teaching, not preparing lessons, not marking assignments and then getting off with impunity because the principal or management team does not act against him or her (Mans 2014:104, H8:l. 311, E5:l. 104). This becomes a general trend when more educators habitually arrive late at school, thus putting the effective running of the school day in jeopardy. Other participants cited examples of toxic educators (or toxic personalities) refusing to be involved in sport and other extracurricular activities (Mans 2014:104, E2:l. 224). These toxic educators had such a strong influence on their colleagues that many educators stopped coaching or performing extracurricular duties. Although the sporting activities continued, they were supported by only a few staff members (Mans 2014:104, E2:l. 224). Incidences were reported (Mans 2014:104, P4:l. 64) where the head of department (HoD) at schools did not fulfil his or her prescribed duties and did not monitor the educators' work or moderate their tests. As the educators were not monitored or moderated, their work did not meet the minimum requirements and the desired standard was not upheld. Before tests or examinations were to be written, then, the educators did 'examination training' (Mans 2014:104, E5:l. 85) – the term used to describe that the teachers only taught the content of the examination paper to the learners in order to obtain an acceptable mark. The HoD's work 'left much to be desired – instead of moderating the question papers, he simply signed it' (Mans 2014:104, E5:l. 78), thus creating an opportunity for educators to get off scot free. From the outside, it seemed as though the school was functional, but in reality, it was in a state of dysfunctional equilibrium. Two cases were reported where schools experienced numerous persistent problems from toxic personalities that influenced other staff members. Various attempts to solve the problems and restore the schools' functionality failed. The problems, in both cases, were solved by relocating the entire staff to other schools and appointing another principal and other staff at the school (Mans 2014:104, DO14:l. 386).

The negative effects of a school that is trapped in a dysfunctional equilibrium are that well-meaning, conscientious or even ambitious employees (educators) are victimised, harassed and bullied by the influential 'bad apples' to such an extent that they are unable to change the human dynamics of the situation (Felps, Mitchel & Byington 2006:182). The phenomenon accords with Bronfenbrenner's ecological theory (Christensen 2010:101–110). Bronfenbrenner (1994:37) contends that the entire ecological system in which an individual's growth occurs must be considered to understand human development. Any individual's ecological system consists of five subsystems, namely the microsystem, mesosystem, exosystem, macrosystem and chronosystem (Härkönen 2007). Bronfenbrenner's ecological theory, applied to the workplace, makes it apparent that colleagues will inevitably affect each other's ecological system. This is also true for educators at school. Bearing in mind that the mind of a person is a delicate and complex structure that can easily be influenced by people with certain abilities and knowledge (Wilson 2014), it becomes clear that the unavoidable contact between fellow educators might lead to negative influencing and dysfunctionality.

Poor management of indiscipline at school level

The handling of misconduct cases at school level is not always a process visible to all. This became apparent when several participants admitted that they did not know how their principals handled cases of misconduct 'behind closed doors' (Mans 2014:105, E5:l. 94) or were very vague about the process followed (Mans 2014:105, H8:l. 258). Upon investigation, it became clear that the initial stages of addressing matters of serious misconduct – for example, examination fraud, or sexual relationships between teachers and learners – are handled by the principal, who then refers the matter to the departmental officials. Some participants acknowledged that they consulted 'the law' (Mans 2014:105, H10:l. 95) before taking the appropriate action. Participants did, however, report specific difficulties in handling cases of sexual misconduct, because perpetrators would give amounts of money to the learner and their family to persuade them to withdraw the case, rendering prosecution impossible (Mans 2014:104, DO14:l. 356). This is a by-product of *Ubuntu*.

The highest incidence of misconduct at the visited schools, however, were cases of educators who did not prepare for or did not attend their classes (Mans 2014:105, P4:l. 36, E5:l. 159, H8:l. 94, P11:l. 284, H12:l. 136, DO14:l. 348, DP15:l. 88). Such cases are usually handled at school level, usually by the principal. The first action that the principals generally take 'to call the perpetrator to order' (Mans 2014:105, E2:l. 145, H10:l. 86) is to have a 'brotherly' conversation with him or her in order to establish if there was a reason for the misconduct being committed. This action was also linked to the *Ubuntu* principle whereby the perpetrator could provide a reason, or an excuse, for committing the misconduct (Mans 2014:101, 105). If the reason or excuse is accepted by the principal, the conversation is seen as sufficient action taken against the perpetrator (Mans 2014:101, H8:ll. 276–286). It was reported, however, that the situation sometimes does not improve and that the same educator commits the same misconduct (Mans 2014:101, H8:l. 75). In such cases, some principals reported that they would implement measures like increased monitoring and control of the educator's work (Mans 2014:105, P1:l. 208, H10:l. 143, P4:l. 87) and make sure that the lost work was caught up (P4:l. 84). Departmental officials are usually not involved, because not being prepared is not seen as 'serious enough to involve the laws [*sic*]'.

In more serious cases – like when corporal punishment is administered – the disciplinary steps taken are different. In such cases, the principals reported that a verbal warning is issued, followed by a written warning and, if the matter persists, a disciplinary hearing with the school management team and school governing body members is held (Mans 2014:105, H10:l. 84). Departmental officials will only be involved in cases where a formal charge has been laid against an educator. Some participants have explained that departmental officials, in their opinion, are not legally capacitated to handle such cases of misconduct satisfactorily; therefore, these officials are not involved (Mans 2014:105, E9:l. 267). Some participants opted to rather handle misconduct cases at the school level instead of involving the departmental officials and possibly lose an educator through disciplinary action, 'because I will rather increase the monitoring and control of the educator than have a class without an educator' (Mans 2014:105, P1:l. 315). This can also be attributed to the slow reaction time of the Department. It was also reported, though, that some principals did not handle the misconduct cases delegated to them at school level, but immediately – and wrongfully – referred it to the departmental officials (Mans 2014:105, DO14:l. 409). It was ascribed to the fear that, should a principal act against a particular person, he would be the cause of that person's suffering (Mans 2014:105, DO14:l. 410). Principals, thus, do not want to accept their responsibilities and be the reason that someone else is harmed.

Misconduct is reported to occur at the level of departmental officials as well. Participants reported incidences where some subject education specialists submitted reports of school visits and even commented on the problems experienced by the school, whilst the school had never been visited (Mans 2014:105, E5:l. 454). Participants also reported that some of the subject education specialists do not moderate the common tasks for assessment as they are supposed to. This results in schools receiving question papers that have numerous problems, such as incorrect content covered, not enough or too many marks, dissimilarities between question paper and memorandum, and incorrect numbering of questions (Mans 2014:105, E5:ll. 395–403). Because subject educators may not see the question papers in advance, these problems frequently go undetected, resulting in 'lots of running around and being frustrated' on the day the paper is written (Mans 2014:105, P6:l. 398).

Trade unions and educator misconduct

Although unions profess to be against educator misconduct, their actions do not always confirm their stance. Participants acknowledge that unions 'can play a role' (Mans 2014:107, E2:l. 152, P6:l. 155, P6:l. 226) in reducing educator misconduct, but it is also reported that unions 'protect' their members in cases of misconduct (Mans 2014:107, E2:l. 157, DP3:l. 118, H10:l. 228, DP15:l. 173). In this case, protection was granted in the sense that union members are not exposed to disciplinary action because, as was reported, the union relies heavily on *Ubuntu* and 'manipulates' (Mans 2014:107, H8:ll. 276, 363, DO13:l. 125, DO14:l. 156, DP15:l. 256) the law. Upon further investigation, it became clear that the law itself was not manipulated but that the unions took advantage of the presiding officers' lack of legal knowledge to get members acquitted on technicalities (Mans 2014:107, Mans 2014:99, DO13, E9:l. 258).

Most participants were members of SADTU, and it was reported that SADTU has 'structures in place' (Mans 2014:107, P6:l. 155) to address educator misconduct. Participants reported that media statements had been issued in which members were urged to behave and observe the prescribed code of conduct (Mans 2014:107, E2:l. 169, P6:l. 158). However, even though SADTU is aware of the laws and stipulations pertaining to strikes and demonstrations, unacceptable conduct still occurs during industrial action (Mans 2014:107, P6:l. 166). For, the Department was blamed by participants for 'generalising and pointing fingers, not pin-pointing the transgressors so that they can be acted against' and for not acting against educators who displayed unacceptable behaviour during industrial action (Mans 2014:107, P6:l. 184). Another participant explained that these transgressors are not acted against because of their 'friendship with influential people' (Mans 2014:107, DO15:l. 225). He explained that the 'influential fingers' stretched across various layers of society to protect the perpetrators and expressed it as 'somebody knows somebody' (Mans 2014:107, DP15:ll. 225–236). He stated that this protection would never be done publicly, 'but maybe they drank together somewhere, where they are not seen' (Mans 2014:107, DP15:l. 231). He also alluded that, even though the Department and rival unions would act and pretend as if they did not condone the conduct of the striking members, these members would not be acted against, because 'if one benefits, all benefit' (Mans 2014:107, DP15:l. 237). In other words, if the strike is successful, everyone will gain the same benefits; therefore, no punishment should be enforced.

Although some members indicated that the union is seen to be 'a lawyer who has to defend their case' (Mans 2014:107, E2:l. 157), other members reported that the union is biased and will promote only their own interests (Mans 2014:107, DP3:l. 124, H10:l. 265). Sometimes, this is achieved by letting a case drag indefinitely until, eventually, the complaint is withdrawn (Mans 2014:107, H10:l. 230). A participant suggested that, in order to let the perpetrator bear his or her punishment, unions should rather not be involved in the initial stages of the investigation, because 'the only action they take against a perpetrator is to reprimand him and warn him not to do it again' (Mans 2014:107, DP15:l. 169). Participants alluded that unions tend to treat the members with 'kid gloves' (Mans 2014:107, H8:l. 293), because 'they do not want to lose members' (Mans 2014:107, H10:l. 259).

■ Conclusion

The findings of the phenomenological study confirm the high incidence of indiscipline and misconduct amongst educators and school leaders at underperforming or dysfunctional schools (Mans 2014:122–124). It seems that indiscipline permeates the education system because not only individual educators but also departmental officials and teachers' unions commit acts of misconduct and indiscipline on a large scale. The reported widespread misapplication of the IQMS (annual work quality evaluations) by educators and school principals further affirms the systemic dysfunctionality that is evident in these underperforming schools (Mans 2014:103). The abuse of sick leave by educators and the collusion by medical doctors or traditional healers to aid such dishonest practices do not bode well for the ethical standards and moral fibre of society (Mans 2014:104). This scourge can only be eliminated if unlawful actions and crimes such as fraud and corruption are diligently prosecuted. In this regard, all stakeholders in education – be it learners, parents, educators, school leaders and departmental officials – have a duty towards society and especially learners to lay complaints, provide evidence and be willing to testify at disciplinary hearings or in court in order hold perpetrators of such misconduct to account (Mans 2014:129).

The correlation between poor learner discipline of learners in a classroom and the unpreparedness or incompetence of educators, as was shown by Oosthuizen (2006:32), is once again affirmed by this qualitative study. A poor work ethic and undisciplined behaviour by educators – such as not properly preparing lessons to teach, not attending classes and absence from work without valid reasons – set poor examples to learners and are certain to have a detrimental effect on the learning culture of a school. In addition, the continued unlawful use of corporal punishment clearly relays the message that educators disregard the law and school rules (South African Human Rights Commission [SAHRC] 2008). Research about the continued use of corporal punishment affirms that learners and parents are aware of its illegality and that such conduct by educators inadvertently influences some learners to resort to violence as a means of solving problems or gaining unmerited advantage (Morrell 2001:299; Mothemane 2003).

The surprising findings of this study were the effect that the notion of *Ubuntu* and the tribal hierarchical system has on the failure to manage educator misconduct or enforce workplace discipline (Mans 2014:129). These aspects have not been sufficiently studied and warrant further research in order to find a multicultural understanding and suitable solution for the education system. Participants acknowledged that their levels of legal knowledge were low, and they had little interest in advancing their knowledge of the law. The Latin legal maxim *ignorantia iuris non excusat* (ignorance of the law is no excuse) is a longstanding legal principle that stems from our Roman-Dutch common law. A person who is unaware of a law cannot escape liability for violating that law merely because he or she was unaware of its content. The rationale of the doctrine is that, if ignorance were an excuse, a person charged with criminal offences, or a subject of a civil lawsuit, or an employee accused of committing misconduct at the workplace, would merely claim that he or she was ignorant or unaware of the law in question to avoid liability. This would result in an untenable situation as every accused would abuse this excuse even if the person does in fact know the law in question. Thus, the law imputes knowledge of all laws to all persons. Though it is impossible even for a legal expert to know everything about the law, this legal principle applies as a matter of public policy to prevent purposeful blindness from resulting in the basis for widespread exculpation. Nevertheless, this study found that the participants were all aware of what it meant to commit a misconduct at work, and there was a general understanding of what was required to be a disciplined and conscientious employee (Mans 2014:102). Thus, most educators would probably not be able to claim that they were ignorant of the standards of performance and duties of an educator.

The concept of justice is one aspect that is highlighted as a result of the misapplication of *Ubuntu* to excuse misconduct. It is incumbent on all citizens, and especially educators who have an influence on learners, to understand the concept and content of justice. It is beyond the scope of this chapter to discuss the concept of justice exhaustively. However, justice, in its broadest context, includes both the attainment of that which is just and the philosophical discussion of that which is just. The concept of 'justice is based on numerous fields, and many differing viewpoints and perspectives'[27] including the concepts of moral correctness based on ethics, rationality, law, religion, equity and fairness. What needs to be understood is that justice also contains an element of mercy or compassion. It is not unconditional compassion – as is sometimes understood with *Ubuntu* – but is measured or properly balanced. Justice for the victims (e.g. learners who are not properly educated) of a misdeed or misconduct means that the harmful effects are compensated for, amends are made or errors are corrected (Mans 2014:129). However, in the workplace, the legal principle of progressive correction (sched. 2, *Employment of Educators Act*) and the system of graduated disciplinary measures are forms of justice combined with mercy and compassion. It is essential for all educators, school leaders, members of school governing bodies, teacher union leaders and departmental officials to understand this. Therefore, it is recommended that training and regular updates on education law be part and parcel of the continuous professional development of educators.

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[27] See 'Justice', in Review of Public Administration and Management, viewed 13 January 2012. https://www.longdom.org/review-public-adminstration-management/contact.html)

Chapter 8

Order and discipline in schools: More to it than meets the eye

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Abstract

This chapter deals with the problem of a lack of order and discipline in classrooms and schools, particularly in South Africa. This problem can, to an extent, be ascribed to conditions prevailing outside of schools, such as those in parental homes and in society. Whatever the cause, teachers are expected to deal with it in their classrooms and in schools. The core theoretical argument of this chapter is that, in addition to teachers' task of

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effectively facilitating teaching and learning situations, they should be equipped, through exposure to a biblical child-anthropology and the classical *paideia* [education, or learning] ideal, with insight into the deeper pedagogical dimensions of their profession. It is argued that only if and when the teacher progresses from being a teacher to being a teacher-as-educator, he or she would be in a position to educate more meaningfully and be able to more effectively manage ill-discipline in his or her classroom.

Introduction

The book in which this chapter appears is about different aspects of school and classroom order and discipline and hence relevant to the situation in which school education in South Africa finds itself. Not much space needs to be used here for substantiating the claim that all is not well with school discipline in South Africa. Daniel (2018:n.p.) recently spoke of 'the recent spate of violence that has rocked schools in South Africa', of 'a recent spate of stabbings and attacks', of 'rising levels of school-based violence' and of 'a disturbing antisocial trend manifesting in many schools'. In saying this, he echoed an observation by Osman (2017:n.p.) about schools being 'in shambles due to violence and ill-discipline'. Osman referred to errant behaviour on the part of the learners, such as pupils loitering on the school grounds, engaging in gambling and in the use of drugs on school premises. According to her (Osman 2017:n.p.), 'there is general agreement about the fact that South Africa schools are being afflicted by lawlessness'. Dhlamini (2018) believes that the situation is much worse than it seems because the violence and indiscipline of pupils in schools are under-reported. Based on what has actually been reported, not fewer than 15.3% of children in primary and secondary schools had experienced some form of violence whilst at school, including threats of violence, assaults and robbery, and also easy acess to alcohol, drugs and weapons at school. One in three secondary school learners knew classmates who had been drunk at school, whilst more than half knew learners who had smoked dagga at school (Centre for Justice and Crime Prevention 2017).

The problem with unruliness and ill-discipline is not only a South African problem. Russo, Oosthuizen and Wolhuter (2015:105) discovered – on the basis of an international survey conducted in 10 countries – that this problem not only prevails in other countries but even tends towards 'dramatic increases' in violent forms of learner misconduct. They discovered the following forms of indiscipline in these countries: late-coming, truancy, leaving school without permission, improper attire and grooming, cheating on tests and in examinations, not handing in homework, forgery, using cell phones without permission, open defiance and rudeness towards the teacher, and using a cell phone in class without permission.

It is impossible to generalise about the causes of the unruliness and lawlessness in schools. Harris (2017) remarked that the features of every single discipline problem are unique in the sense that it resonates with the particular student involved, as well as the unique set of circumstances the student was subjected to. He mentions problems at home, with peers and also perceptions and disabilities as possible major causes of the problem. Typical manifestations of unruly behaviour in classrooms are teacher-on-learner or learner-on-teacher and learner-on-learner confrontations, absenteeism, late-coming, talking or joking during lessons, laughing, strolling around in class, leaving class without permission, eating and occasionally even sleeping during lessons. Whatever the cause of the problem of indiscipline in schools, disruptive behaviour in schools and in classrooms is because its negative effect on the outcome and progression of teaching and learning. As in all other spheres of society, order is essential in classrooms to ensure effective teaching and learning. Hiemstra and Gonin (1990) even go as far as to regard order as a *conditio sine qua non* for effective teaching and learning.

South Africa is paying a heavy price for the current situation in schools, according to Bruce Whitfield (2018):

> [*T*]he calamitous failure [*at the end of 2018*] of two-thirds of the kids who started school in 2005 to even sit, never mind pass matric exams, and the fact that not many more than 35 000 got a university level maths pass is the brutal reality of an education system failing the country. (p. 8)

In their efforts to eradicate errant behaviour, indiscipline and unruliness in schools and classrooms, education policymakers as well as teachers on the ground have in the past resorted to either reactive–punitive or preventative–positive measures. There have been indications during the past three decades of a gradual shift from the former to the latter. One of the most striking approaches in terms of the preventative–positive strategy is the overlooked value of the person and presence of the teacher (as educator) in the classroom. In view of this observation, the central theoretical argument or thesis of this chapter is as follows: irrespective of the extent to which a teacher conforms to the image of the 'ideal' teacher, and irrespective of how well-trained and qualified a teacher might be for his or her profession as classroom educator, the teacher should display at least two additional qualities in order to not only teach effectively but also be able, as teacher-educator, to maintain order and discipline in the classroom and school. These two qualities are (1) the ability to see and approach the learner not only as somebody who has to pass a grade, who has to do well in tests and examinations (assessments) and whose achievement, finally, is reflected as a statistic on a scoresheet at the end of the school year – one of the 'passes' or 'fails' of the academic year, and (2) the ability to see the teaching profession not as a remunerated occupation but rather as a calling – a position that attests to a deep level of commitment on the part of the teacher. Both of these capabilities, if they are present in a teacher, will aid him or her to morph from being a 'mere' teacher – a person who professionally dispenses particular chunks of knowledge and skills to children – to a teacher-as-educator, that is, a teacher who is capable, in a context of order and discipline, of guiding and equipping less mature persons to ever-higher levels of maturity.

Our approach in arguing this chapter

There seems to be a lack of discipline and order in South African schools and classrooms. Because most of the other chapters in this book also attest to this unfortunate state of affairs, we do not belabour this point any further but rather continue with the business of expounding the dual task that we have set ourselves.

Regarding the lack of discipline and order in South African schools and classrooms, our first argument is that teachers should follow a dual approach in so far as their fundamental view of the child (learner) as a human being is concerned, namely to view the child through a Scriptural (biblical) lens as well as the classic lens of the *paideia* ideal. It is our contention that the teacher will only morph into (gradually develop into becoming) a true educator (i.e. teacher-as-educator) by adopting a 'new' child-anthropology or view of the child as human being, one inspired by, on the one hand, seeing the child through a biblical lens and, on the other hand, seeing the child through the age-old *paideia* lens in terms of which the child is regarded as not only a potential passer of assessment procedures but as a well-rounded person on the road to maturity.

Our second argument is that firstly the teacher plies his or her profession in the context of a societal relationship, the school, in which order and good discipline are *condiciones quibus sine non* (indispensable and essential conditions). It is argued that the school – like all other societal relationships – has its own unique form of and approach to order and discipline. We further argue that the order and discipline that are typical of the school would attain a still deeper and more profound quality if the teacher regards the teaching profession as not a 'mere' occupation but a calling characterised by a deep commitment to Him who has called the teacher to the task of guiding and equipping young people.

We employed an interpretivist-constructivist approach to construct these two arguments. In the interpretive phase, we examined, and attempted to gain insight into, the world in which teachers typically ply their trade, namely the school as a societal relationship. Interpretivists depart from the premise that an activity such as teaching–learning emerges from intentional action and interaction at the individual level in the context of a variety of other internal and external factors. As interpretivists, we are convinced that teaching and learning do not proceed deterministically but rather as a person's chosen course of action, and hence our arguments and claims remain tentative and contingent. Our interpretations of what teachers ought to do or not to do in connection with the establishment of order and discipline in classrooms and in schools then culminate in the construction of the dual approach that we propose: the *paideia*-ideal approach and the calling-commitment approach.

Constructivism, as the second element of our research method, is based on the assumption that reality and the human behaviour therein – such as the teacher being inspired to also become and be an educator (i.e., a teacher-as-educator) – are characterised by all kinds of fluctuations, adjustments and transformations that occur in the space occupied by the teacher. The purpose of the constructivist phase is to paint a picture of the teacher-as-educator able to establish and maintain good order and discipline in his or her classroom and school, based on his or her embracement of the *paideia* ideal and obedience to a divine calling as educator (Van der Walt 2020; Van Huyssteen 2006:15–16, 27, 46).

Order and discipline as indispensable conditions for effective teaching and learning

The presence of order is one of the essential features of a well-functioning society. William Golding's book entitled *The Lord of the Flies* provides us with a vivid picture of a society in which order has totally collapsed after a group of schoolboys had stranded on a desolate island (Golding 1958). The book also attests to the fact that the innermost being of humankind, if left to its own devices, without any curbs, is speckled with ‘brutality and terrorism’ when the group’s little ‘paradise’ on the island was destroyed in ‘fire and cannibalism’ (Li & Wu 2009:1, 4). The Bible likewise speaks of the state of the unredeemed in Jesus Christ, namely being the victim of original sin or ‘man in the state of sin’. Sin, according to the Bible, is transgression of the law of God. That sin, according to Berkhof (2005:221), carries ‘permanent pollution with it, [...] a pollution which, because of the solidarity of the human race, would affect not only Adam but all his descendants as well’. Because of this perennial depravity of humankind, Hobbes and various other philosophers such as David Hume, Immanuel Kant, John Locke, Friedrich Nietzsche, Jean-Jacques Rousseau and, more recently, John Rawls (2016:535) suggested that order in society be sought through the creation of a social contract between the citizens and their government in terms of which the individual citizen’s rights and obligations are defined, regulated and respected by the government (Crowe 2020:1). The notion of reciprocally defining the rights and obligations of all concerned could also be transferred to the school as a societal sphere because, as Douglas (2020:250–252) observed, a social contract provides for the securing of order, protection, safety and trust and the conditions that underlie cooperation amongst all concerned, in this case, amongst the teachers and the learners.

It could be claimed that the South African Constitution adopted in 1996 formed the social contract between the citizens and their Government. This ‘contract’ has now (2021) been in place for around 27 years. Its application has through this time periodically been tested in courts of law, including the Constitutional Court as the highest court of the country. The national DBE – which regulates school education in South Africa – is expected to function in accordance with legislation that resonates with the stipulations of the Constitution (‘contract’). The same applies to the executive duties of the nine provincial departments of education that function under the auspices of the national DBE and also for school governing bodies that are responsible for the governance of local schools. In sum, the orderly functioning of South African education as envisaged in the 'social contract' embodied in the Constitution is expected to filter through from the highest echelons to the lowest levels of the education system – from the DBE to the activities in the classroom. The promulgation of legislation such as the *National Education Policy Act* (RSA 1996a), the *South African Schools Act* (RSA 1996b) and the adoption of codes of conduct for learners are all measures ensuring that order and discipline filter through from the highest to the lowest levels of the education system.

Section 3(4)(n) of the *National Education Policy Act* (RSA 1996a), for instance, determines that national legislation may be promulgated for 'the control and discipline of learners at education institutions'. In terms of this stipulation, Section 8 of the *South African Schools Act* (RSA 1996b) obligates school governing bodies to formulate codes of conduct for their respective schools in order to 'secure the establishment of a disciplined and purposeful school environment, dedicated to the improvement and maintenance of the quality of the learning process'.

The above-mentioned filtering down of the notion of order and discipline in the education system, particularly in classrooms and schools, in the end should be observable at the most basic level of the education system, namely the classroom. Section 1 of the *Guidelines for a Code of Conduct for Learners* (RSA 1998) (hereinafter the *Guidelines*), therefore, emphasises the establishment of 'effective education and learning in schools' and states that the purpose of such a code is to promote positive discipline and exemplary conduct in schools. Significantly, it adds the rider that a code of conduct is to focus on positive discipline and not a 'punitive and punishment' orientation. Order and discipline should 'facilitate constructive learning'. It further stipulates that a code of conduct should be aimed at promoting and clarifying the roles of the various stakeholders in the establishment of a 'proper environment in schools'. Section 5 of these *Guidelines* goes so far as to make special provision for classroom rules and focuses pertinently on the relationship between teacher and learner at the heart of the teaching and learning environment – the classroom. Also significant in view of the core argument of this chapter is the fact that Section 7 of the *Guidelines* stipulates that the objectives of both the school code of conduct and the classroom rules are to be formulated in such a way that they 'ensure that the education of the learners proceeds without disruptive behaviour and offences', amongst others, by promoting self-discipline in the learners.

■ The management of learner misconduct: Run-of-the-mill approaches

In this section, we deal with how teachers without the benefit of the deeper and more profound biblical child-anthropological and *paideia* perspectives can be expected to deal with misconduct, ill-discipline and errant behaviour in schools. The sections 'The management of learner misconduct' and 'The teacher to transform from a professional dispenser of knowledge and skills to a true teacher-as-educator' are devoted to an outline of how the teacher-as-educator's insight into order and discipline in his or her classroom might gain depth and quality once he or she has also delved into the intricacies of the biblical child-anthropological and *paideia* orientations.

In South Africa, the relevant statutory provisions, such as the *Guidelines* (also cf. RSA 1996b, 1998), identify two categories of misconduct: non-serious and serious forms of misconduct. Non-serious misconduct includes interruptions and disruptive behaviour, rudeness, untidiness, disrespect towards teachers, cheekiness and provoking behaviour, moodiness in class, telling lies, dishonesty, tardiness, neglect of duty, absenteeism, smoking and improper language (Serame 2011:38–41).

Section 11 of the *Guidelines* refers to the following as forms of serious learner misconduct:

- dangerous conduct which, for example, endangers the safety of others
- disrupting and/or violating the rights of others
- visible evidence of the use or the possession or transmission of illegal substances, such as illegal narcotics, intoxicants or drugs
- physical violence, such as fighting, attacking and/or battering
- indecency, such as immoral behaviour and/or profanity and vulgarity
- deception, such as false identification of oneself
- despicable speech and/or conduct in the form of harmful graffiti, hate speech, sexism or racism
- embezzlement in the form of theft and/or the possession of stolen property, including the stealing beforehand of test and/or exam question papers
- sabotage in the instances of vandalising and destroying or damaging of school property
- ignoring human dignity by showing disrespectful conduct and/or verbal abuse towards members of school staff or towards a fellow learner
- repeated transgressions of the school rules and/or its code of conduct
- committing any kind of offence such as rape and/or sexual harassment
- the intimidation of fellow learners in the form of, for example, bullying and/or intimidation
- the violation of an exam rule
- intentionally providing false information, or the falsification of document(s) in order to attain an unmerited advantage at the school.

There is a myriad of approaches to and methods for dealing with learner misconduct (both non-serious and serious) in schools and classrooms. We concentrate on a classification of approaches based on the inclinations and motives of the teacher as disciplinarian, namely reactive approaches (sometimes referred to as punitive) as opposed to preventative, prospective approaches (Oosthuizen, Rossouw & De Wet 2019:144, 161).

Reactive and punitive approaches

During the 1980s, the rates of juvenile arrests for violent crimes in the United States of America were constantly on the increase (Kang-Brown et al. 2013:1). In reaction to the increase of violent behaviour amongst juveniles, the United States Congress promulgated the *Gun-Free Schools Act* in 1994 – an Act with a strong zero-tolerance undertone. With the juvenile crime rate reaching a peak around two years later, Dilulio (1995:23) predicted the emergence of a generation of ‘super-predators’. Although the zero-tolerance approach was connected to the ‘guns-free’ scenario, it gradually became applied to much less serious forms of misconduct – occasionally even for insubordination, smoking at school or disruptions in class (Kang-Brown et al. 2013:3, 4). This approach seems to have become standard practice during the latter part of the 20th century and in the first decade of the 21st century. By 1997, around 79% of the United States’ public schools had adopted zero-tolerance policies for dealing with learner misconduct (Kang-Brown et al. 2013:2) – a so-called ‘one strike and you’re out!’ approach. The approach, based on national policy, entailed meting out harsh punishment in case of serious misconduct – even suspension or expulsion, without taking circumstances into consideration (Gjelten 2020).

Whilst the education authorities were in combat with the phenomenon of violence amongst the young, another, much more serious problem appeared on the horizon, namely a dramatic increase in the number of suspensions and expulsions, including the negative consequences of this form of punishment. The number of learners expelled or suspended from schools increased to about 40% of all the learners. By 2013, an estimated

2 million students (learners) were suspended annually (Kang-Brown et al. 2013:2). Expelled or suspended learners, particularly those from secondary schools, were likely to have to repeat the grade once they were re-allowed in school. The numbers of these learners or students became a key indicator of future school dropout numbers (Jimerson, Anderson & Whipple 2002:441).

Although the tide began to turn during the first decade of the 21st century, many voices began calling for an approach without such negative consequences. In fact, such voices had been raised as far back as 1979. It was argued, for instance, in the American Supreme Court case of *Bellotti v. Baird* that 'youth is more than a chronological fact' and that it actually is 'a time and condition of life when a person may be most susceptible to influence and to psychological damage' (Newey 2019:227). In 1990, Wexler (1990:7) stated in a book on therapeutic jurisprudence that the United States of America's criminal justice's punitive system was creating new psychological and emotional trauma in people, especially so in the lives of juvenile offenders who were still immature and highly vulnerable.

The Supreme Court ruling of *Roper v. Simmons* (2005) was a breakthrough in the continued application of the zero-tolerance approach in that its ruling regarding the unconstitutionality of capital punishment to an under-18-year-old offender also led to the relinquishment of the zero-tolerance policy in schools. The court grounded its ruling on social research on the maturation level of adolescents (Newey 2019:1). Justice Kennedy, presenting the majority ruling, explained the *ratio decidendi* of this ruling in terms of three main arguments:

- **The juvenile in a transitory phase –** The development curve of the juvenile must be taken into consideration. Justice Kennedy emphasised that juveniles are not fully developed human beings, with their characters not as fully formed as that of an adult. 'The personality traits of juveniles are more transitory, less fixed' (Garland 1990:n.p.). He also emphasised that juveniles not only find themselves in a particular phase of brain development; they are still in a stage of brain maturation that causes them to underestimate the outcome of some of their actions.

- **The juvenile prone to peer pressure –** At the same time, adolescents are highly susceptible to negative influences such as peer pressure. Adolescents find themselves dependent on the acceptance of their peer communities and acceptance by their particular school society. Research shows that not being accepted in their school environments often leads to loneliness, stress, mental disorders, melancholy and even suicidal tendencies (Allen & Bowles 2012:111).
- **Restorative justice –** Restorative justice has a religious undertone in that it seeks both restitution and restoration, healing rather than removal or rejection, forgiveness rather than revenge or payback (Eglash 1977). Restorative justice not only focuses on the restoration of both the offender and the victim but also endeavours to repair broken social connections (Minow 1998:14).

As far as the situation in South Africa is concerned, no zero-tolerance policies appear in any of its educational statutory documents of the past 50 years. However, the general approach in South Africa was always inclined towards a punitive approach, particularly in cases of serious misconduct. According to Section 4 of the *Education Affairs Act* (RSA 1988), corporal punishment was one of the main forms of punishment in schools during the apartheid (pre-1994) era. In terms of this section, the principal of a school or any teacher with the authority to do so, delegated by the principal (or the person in control of the school) to do so, was permitted to administer a maximum of five strokes with a cane to a male learner for serious as well as less serious forms of misconduct. They were permitted to administer such punishment in the office of the person in control of the school, or in the principal's office, or in any other place authorised by the principal or the person in control of the school. Section 5 and Section 6 of this Act (RSA 1988) also regulated the expulsion and suspension of learners from schools. In all of these decisions, the school principal was expected to play an important role of control. Under certain circumstances, a school principal was authorised to suspend a learner from school after consultation with the circuit superintendent. In the case of expulsion from the school, the Executive Director of Education had to make the final decision. The Executive Director of Education was authorised to not only make a final decision on the expulsion from the school in question but also from all other schools.[28]

This was to change in the post-1994 constitutional dispensation.

Preventative approaches as a form of positive discipline

In reaction to the negative effects of the zero-tolerance policy in the United States of America, research was conducted by the national Department of Education for the purpose of identifying more suitable approaches for coping with learner misconduct. A report was tabled in 2014 which advised that more positive forms of disciplining be adopted (USDE 2014:11). In post-1994 South Africa, a change in policies came about as a result of the recognition of the fundamental rights of the child, amongst others, the right of the child to basic education (RSA 1996c:s. 29, 28[2], 33), the best interest of the child as 'of paramount importance in every matter concerning the child' as well as just administrative action for everyone.

Research findings over the past three decades have drawn attention to the important role of the teacher in the maintenance of order and discipline in the classroom. Scholars have been emphasising the fact that the teacher plays an important role in the prevention of learner misconduct (Wolhuter, Van der Walt &

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[28] In terms of Section 6(1) (South Africa 1996b; [*author's added emphasis*]), the Executive Director shall decide: 'If he [the learner] was suspended from a public school (i) shall be excluded from certain public schools determined by the Executive Director; or (ii) shall be excluded from *all* public schools'.

Potgieter 2013:54). This finding is in line with that of the Elton Report in the United Kingdom (DESWO 1989), namely that, amongst the many factors at work in learner conduct and hence in the maintenance of order and discipline in the teaching and learning environment, the teacher can play a key role in the promotion of acceptable learner conduct. In a follow-up survey conducted in nine countries by Wolhuter et al. (2013:54), they discovered further evidence that teacher conduct had an impact on learner conduct. The example set by 'good' teachers could have a positive effect on the conduct of their learners. They discovered that the constant exposure of the learner to the exemplary conduct of the teacher could inspire the former to 'voluntarily (become) disciples' (followers) of such a teacher, and this might prevent misconduct. Although this research was conducted amongst learners of schools in 10 different countries[29] – in other words, from a variety of cultural backgrounds – the desired teacher traits were much the same or at least comparable. This enabled the researchers to paint a picture of the 'ideal' teacher (Wolhuter et al. 2013:62): a person with a clear, audible voice, with proper articulation (as opposed to a loud voice or shouting); someone who is in control of the situation in the classroom; with positive body language and facial expressions; and who is readily approachable, pleasant, calm and collected as opposed to one who is deemed to be inaccessible and exuding a defensive body language.

Another series of surveys during the first decade of the 21st century in various parts of South Africa confirmed the vital role that teachers could fulfil as role models for the purpose of preventing learner misconduct (Oosthuizen 2007; Serame et al. 2013:65; Wolhuter & Van Staden 2007:56). This research revealed the following two methods to be the most effective: thorough lesson preparation by the teacher, and teacher expertise (thorough mastery of subject knowledge). Other effective methods were teachers having regular meetings or discussions with the parents of the learners, the establishment of classroom rules and the application of a positive discipline approach.

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[29] England, Greece, Latvia, Slovenia, Serbia, Bulgaria, Turkey, Pakistan and South Africa.

Although many of these intercessions and procedures might be positive and effective for the maintenance of good order and discipline in the classroom, we would argue that the teacher who possesses insight into the learner and his or her education – which can be provided by a biblical child-anthropological perspective and the *paideia* ideal – could arguably be even more effectively in charge of the situation in the classroom. The child-anthropological perspective and the *paideia* ideal would, in our opinion, provide teachers with an in-depth understanding of what learners require to grow to full maturity and with the ability to provide in their needs to achieve such maturity. In sum, our proposal is that teachers should strive to go beyond run-of-the-mill approaches to the prevention and management of learner misconduct and the promotion of the order and discipline required for effective teaching and learning. In our opinion, adoption of the two orientations proffered in the section 'The management of learner misconduct' would enable them to do so.

The management of learner misconduct: The deeper perspectives provided by the biblical child-anthropological and *paideia* orientations

A biblical child-anthropological orientation

Professionals such as teachers – particularly those who wish to deepen their practice from teaching to true education – should have a thorough understanding of the essence of childhood or youngsterhood. Put differently, the teacher-as-educator requires a child-anthropology to guide him or her in the pedagogical process.

Without such an anthropology, the teacher would not be able to assign deeper meaning to the various elements of the *paideia* ideal outlined in the section 'The *paideia* orientation' of this chapter. Even more to the point, the teacher would not be able to draw meaning from the *paideia* ideal if it should be proffered to him or her as a 'view from nowhere'. It is for this reason that Nuraan Davids (2018) found it necessary to state:

> [*S*]ince it is not possible to discuss an Islamic philosophy of education without taking into account the Quran as its starting point, the first section [*of her chapter in that particular book*] looks at the Quran as the primary source code of Islamic education. (p. 671)

It is by this same token that the following outline of a child-anthropology is rooted in the inscripturated Word of the Triune God, the Bible.

The Bible teaches that a child is a gift from God to the parents (Ps 127:3; Ps 103) and that the child was conceived in the image of God. Although the image of God in the human being became distorted because of original sin, it was not totally destroyed. God remains the constant Protector and Educator of the child (Ps 71:6, 17). He constantly listens to the voices of children (Gn 21:17). He also is the Father of the orphaned (Ps 68:6; Hs 14:4), he adopts them (Ps 27:10), protects them against oppressors (Ps 10:14, 18) and keeps watch over them (Zch 7:10). God's care for the child grows in significance when viewed in covenantal perspective (Ps 105:1–11): God promised that he will remain Abraham's God as well as the God of all his descendants (Gn 17:7). Jesus uses the innocence of children in his explanation of why adults should live in complete dependence on God (Mt 18:3).

The fifth commandment in the Decalogue calls on children to be obedient to their parents and to all others in authority. Paul calls on them to be obedient to their parents 'in the Lord' (Eph 6:1), meaning that they should do so to please the Lord, to demonstrate their love for him, to honour him. These expressions explicate the nature of the obedience that is expected of them: they should not be obedient because of being afraid of punishment or reprimand or as a result of coercion but because they feel the need to please the Lord (Col 3:20). They should obey their parents and all others in authority in the same manner that Jesus Christ did in obeying his parents (Lk 2:51). 2 Timothy 1:7 underscores the fact that God endowed his children with a spirit of power, of love and self-discipline. Paul reminds Timothy, his student, ‘to keep (what Timothy had heard from Paul) as the pattern of sound teaching, with faith and love in Christ Jesus’ (2 Tm 1:13). To do so is important, according to Tripp and Tripp (2008:93), because children are ‘instinctive worshipers. They are glory-givers. (To do so) is not a conscious decision on their part; they are hard-wired for worship’. It is, therefore, important to guide children to see the glory of God and to respond in worship, adoration and love for God. Children are naturally inclined to go into the world in search of an answer to the question: What makes life worth living? According to Tripp and Tripp (2008:n.p.), they do not have to look far, because ‘the world conspires to seduce the heart with cheap and empty pleasures’. It is, in view of such temptations, incumbent upon the educators to guide them to see God in his creation. Romans 1:19–20 says that God is revealed in his creation. Educators are called upon to guide children so that they can understand that creation or the world showcases the artistic creativity, the endless power and the manifold wisdom of its Creator so that they might find eternal joy in his glorious goodness. Through education they must be discouraged to exchange the glory of God for the worship of created things (Rm 1:21–23).

The core concepts encapsulated in the *paideia* ideal can be interpreted in light of this brief child-anthropology.

The *paideia* orientation

The term *paideia* originated in the context of the classical Greek system of education and training and originally simply meant ‘childrearing’ (Alt & Eberly 2019:96). In its original form, *paideia* was aimed at civic schooling and personal training and was based on the notion that people needed a shared space of communality for political and social life to exist (Säfström 2019:610). Gradually, however, its meaning was extended to also include other ideals, such as striving for the highest *arête* (excellence or virtue) possible to humankind, the sum total of all ideal perfections of mind and body. The term *paideia* was employed to refer to the proper moulding of a learner's entire character for successful participation in *polis* (city-state) life (Alt & Eberly 2019:96).

The *paideia* ideal has succeeded in surviving through the ages, up to the present time, and in the process, it has been endowed with ever more meaning and significance. The core idea of the *paideia* ideal – namely that it makes society possible – has been preserved up to our own time (Grayling 2002:157–158). In due course, scholars have attempted to elucidate this notion of 'making society possible'. It is averred, for instance, that adoption of the *paideia* ideal enables a person to live more 'reflectively' and 'knowledgeably', especially about the range of human experience and sentiment, as it exists now and here, and in the past and elsewhere. This, Grayling claims, makes us 'better understand the interests, needs and desires of others' (Grayling 2002:157–158) so that we can treat them with respect and sympathy. The long-term aim of *paideia* is to produce people who go on learning after their initial formal education has ceased, who think, question and know how to find answers when they need them. In his opinion, the *paideia* ideal, therefore, has a civilizing and ethical function. De Botton (2012:111) joined the discussion about the meaning of *paideia* in our own time by contending that pedagogics has the task 'to nurture, reassure, comfort and guide our souls', to turn us into better, wiser and happier people. In his opinion, education in the *paideia* spirit should concentrate on teaching learners emotional and ethical life skills, how to love their neighbour and to leave the world a happier place than they found it. This, however, is not sufficient for the education of the whole person. Other elements – aside from the rational, intellectual, analytical mode of human existence – that need to be included in the informal curriculum are emotion, wisdom (life skills), self-awareness and moral stewardship of the self and of others, morality and relationships (De Botton 2012:103).

Although not explicitly linking their suggestions to the *paideia* ideal as such, other authors followed De Botton's lead by suggesting that, in our day, the education of the person of integrity, the organic individual, the person displaying a noble character, has become more important than ever. Education should be based on the notion of life and of the individual as a whole. The latter's overall character must be developed and unfolded through education (Grayling 2002:157). According to Kourie (2006:24), the person educated in the *paideia* spirit has understanding of the connectedness amongst all things, lives for others and avoids self-centredness, shows compassion, tolerance, forgiveness and a sense of universal brother- and sisterhood. Nolan (2009:13) concurs that the person educated in this spirit would be a fully integrated person, able to transcend his or her self-centredness and to work towards unselfish altruism. Noshulwana (2011) underscores the sense of wholeness: a person of integrity is a whole or complete person, a person who knows that he or she is living rightly, a person who can be trusted to do the right thing, to play by the rules and to keep commitments.

Kazamias (2009b:1268) also looked at education not in the narrow sense of schooling but in the broader sense of *paideia* where the educator's concern is with the human being and with the greater problems – political, social and ethical – that humankind face. He contended for a broader and more 'general' type of knowledge in the place of the predominantly techno-scientific, instrumental and pragmatic type of knowledge associated with the knowledge society and the schools that serve such a society (Kazamias 2009a:811). Education should not be alienated from the 'everydayness' of living, of living in the present. Education must take place in a space in which a young person can attach to the world as it is (Säfström 2019:616).

It is clear from these two brief outlines of a biblical child-anthropology and of the *paideia* ideal that the emphasis should be shifted from enforcing order and discipline in pedagogical contexts, such as a teaching–learning situation, to the formation of learners to become well-rounded individuals on the road to becoming mature and responsible adults. The emphasis is on education – that is, forming, guiding and equipping and nurturing – rather than on the enforcement of order and discipline. Put differently, the emphasis is on the long-term perspective associated with education and not the short-term view of enforcing order and discipline in classrooms.

The teacher to transform from a professional dispenser of knowledge and skills to a true teacher-as-educator

Society, as observed above, can only function effectively if order and discipline prevail. If order and discipline are absent, society collapses in lawlessness, anarchy and even anomie. The same applies for the different societal relationships of which society is composed: the state and government, the business, trade and commerce sector, religious institutions, core and extended families, marriages, sports clubs, institutions of learning, such as schools, colleges and universities and so on. The order and discipline that prevail in each and all of these societal relationships or circles ensure that life in a particular area, such as a country, province, city or town, is orderly and disciplined. This does not mean, however, that the same or similar types of order and discipline prevail in all the various societal relationships. The order and discipline expected in and from the state and government is of a juridical type, for instance (cf. the overview of the legislation above), and in a family of a loving or caring type. The order and discipline expected in a school, college or university are of an analytical type, in other words, typical of a teaching–learning institution. The order and discipline expected to prevail in such institutions are of a type that would create an environment in which teaching and learning can effectively be conducted or occur.

Whilst no societal relationship – not even a parental home or a school – as such, can be regarded as a pedagogical institution, all societal relationships also have a pedagogical function. This can be illustrated with reference to the role that states and governments played all over the world during the Covid-19 pandemic in 2020. In executing its duty of enforcing juridical order and discipline – also referred to as 'law and order' – governments all over the world promulgated regulations to safeguard their populations from the virus. The governments also instructed state officials, such as police officers, soldiers and health officials, not to throw people in jail for contravening these regulations which had been put in place for the citizens' own health and safety but rather to educate them, that is, to guide and teach them to adhere to the prescribed health measures. In doing so, governments as juridical societal relationships executed their pedagogical duties, as a secondary function. This point can also be highlighted with reference to order and discipline in schools. Although schools are institutions of teaching and learning – in other words, institutions with an analytical leading function – they (as well as the teachers) also have a secondary pedagogical function. Put differently, in the process of planning and facilitating the teaching–learning processes in classrooms, teachers also have to apply their minds to the guiding, equipping, enabling and nurturing of the learners.

In sum, then, whilst no societal relationship *per se* is a pedagogical relationship, all of them also have a secondary pedagogical task, that is, the task of guiding, leading, equipping and nurturing those whose well-being is entrusted to them. All the societal relationships that make up the totality of society have such a pedagogical task, and the members of each societal relationship should be made aware of this task. This awareness is (or should be) ideally brought home to the members of the societal relationships during their initial training as professionals. In most cases, members undergo formal training that qualifies them to function effectively in their respective societal relationships (e.g., lawyers and advocates, doctors and nurses, government officials, architects, engineers and so on). Others, such as individuals considering marriage and/or parenthood, undergo, or should undergo, informal training for their future tasks and roles as husbands, wives, fathers and mothers. The impending pedagogical task is constantly present and demands attention. There are, of course, instances where individuals and groups (such as parents) overlook or neglect this task, and this arguably might be one of the causes of a lack of law and discipline.

Harris (2017) found that problems such as stressful situations at home are noticeably linked to learner misconduct at school and in the classroom. Children who are abused and neglected at home can misbehave in school. Ngwokabueni (2015:7) concurs that unhealthy home conditions can lead to order and discipline problems in school. He mentions the problems of children experiencing feelings of frustration and insecurity: parents too busy to involve themselves with the children, the company kept by children, the movement of children and what they do around the home, the bad moral examples set for them, the grownups' disrespect for authority, and so on. All these problems boil over into the schools where the teachers must cope with them.

This now brings us to the role of the teacher in the school and classroom. The teacher, first of all, and in line with what has so far been said of the training of professionals, is a professional facilitator of the teaching–learning process. This process is by no means mechanical but is heavily anthropologically loaded, in other words, it is a process conducted by, in and amongst a collection of people, each with their own teaching and learning potential, motivation, problems, ideals, health conditions, home background, social problems and challenges, and so on. Teachers must navigate their way through all this anthropological undergrowth in the process of facilitating an effective teaching–learning process. They will, arguably, only be able to do this successfully on the basis of the pedagogical insights they were made aware of during their initial and ongoing teacher education (training), and also elsewhere.

Ideally, therefore, teachers should not only be well-prepared for their professional task of effectively facilitating teaching and learning processes but also for their other (secondary) task that accompanies their professional task like a constant shadow: their pedagogical – formation, nurturing, guiding, equipping and enabling – task. Whilst the results of teachers' basic professional task can indeed be assessed at the end of the school year – in the form of statistics (promotions to the next school year, number of distinctions and number of dropouts) – the outcome of the pedagogical task cannot be measured in the same way, because education in the wider sense of forming, training, equipping and nurturing entails the formation of the whole person. This is where the *paideia* ideal becomes relevant.

The *paideia* ideal takes teachers beyond the measurable achievements they might be able to deliver (such as the annual pass rate of their learners) and also beyond the immediate classroom situation. The *paideia* ideal is all about the long-term pedagogical task that accompanies teachers' professional work like a constant shadow. Teachers who are aware of their *paideia* task would know and understand that, in the teaching–learning processes they are facilitating, they are also deeply immersed in the task of childrearing and the formation of the 'whole person' of each learner. They are deeply conscious of the fact that they are constantly involved in the process of character formation and that the phrase 'character formation' is pregnant with a formidable set of ideals and aims: they are preparing young people for meaningful participation in social life, for serving society somewhere in future and to make a well-functioning society possible; they are in the process of bringing home emotion, sympathy, love for others, wisdom and moral stewardship to their learners. In brief, they are in the process of forming better, wiser and happier individuals, people of integrity and nobility of character. This long-term vision should ideally help teachers transcend the difficulties brought about by short-term disorder and learner misconduct. They have their eye fixed on the end result.

Teachers' insight into the child-anthropology outlined above could serve as a guide in their efforts to attain the goals encapsulated in the *paideia* ideal (whilst the principles contained in the biblical child-anthropology that we proffered were drawn from the Bible, much of what it contains could arguably also be applicable to the professional practice of teachers with other religious orientations). According to the child-anthropology outlined above, the child is a gift to his or her parents, and teachers should respect this. The parents are the child's primary caregivers and educators. Teachers, whose primary occupation is to facilitate the teaching–learning process in classrooms and schools, can, therefore, be regarded as their secondary educators. Their educational interventions should, therefore, ideally link up with those of parents (this is the rationale behind the principle that representatives of the parent body also serve on school governing bodies: their task is to see that what occurs in the school dovetails with the spirit of parental homes). Teachers also should be constantly aware of the fact that children have been created in the image of the Triune God; that original sin and ongoing tendencies to sin (that find expression in disobedience to parents and teachers and in unruly behaviour) have distorted this image in the human being; that the child has in principle been forgiven in Jesus Christ for all his or her sins and transgressions; and that the child has been called to serve God and his or her fellow human being, has to show sympathy and compassion, and contributes to the well-being of all in society. The child must be guided, nurtured and enabled to worship God in everything that he or she does and serve his or her neighbour with love and compassion. This is clearly another long-term vision behind teaching and learning in classrooms.

Because of the Randhart court case (Randhart 2017:3), many teachers in South Africa today ply their profession in schools without a particular religious identity (in that they differ from the private or independent schools which are allowed to possess and display such an identity) and, therefore, are seldom exhorted by their managers or leaders (such as the Department of Education, the principal or vice-principal) to occasionally reflect on the deeper dimensions of their profession, such as the *paideia* ideal and a biblical child-anthropology. According to the latest available census statistics, around 70% of South Africans still adhere to the Christian religion (nominally, or as active church-going believers), and this makes it not only possible but also necessary to remind the teachers in this group of believers of the deeper dimensions of their work as teaching–learning facilitators. This point is probably also applicable to the adherents of other religions. It must be underscored that, although we are emphasising the deeper dimensions of the teacher's profession, we are not in favour of proselytising in schools. Schools are teaching–learning institutions and not religious institutions or places of worship. The South African Constitution does make provision, however, for a teacher's (in fact, every citizen's) right to freedom of religion and of speech – on condition that the same rights of others, such as those of learners, are respected.

It is clear from the above that much depends on the basic attitude and the long-term perspective of the teacher-as-educator. The phrases 'basic attitude' and 'long-term perspective' refer to how the teacher tends to feel, think and act in the classroom: his or her basic attitude and relationship with the learners, the learning material, the parents and his or her colleagues. What counts in this regard is not virtue in general but rather professional virtue, according to De Muynck (2012:12). The basic attitude of the teacher with a biblical-anthropological orientation, according to him, consists of, amongst others, taking responsibility for the future of the learners, and this – as we have argued above – entails going beyond the actual teaching and learning situation to the pedagogical (i.e. the forming) situation. The teacher who ventures beyond the nuts and bolts of teaching and learning towards actually also educating in the pedagogical sense of the word – that is, the *paideia*- and the biblical child-anthropological sense – becomes a teacher-as-educator, a guide. Such a teacher is less concerned about the short-term order and discipline obstacles in the classroom than with the long-term pedagogical outcome of his or her work.

The teacher does not have to search far for the courage to become a guide towards the future for the children entrusted to him and her: it flows to the teacher from his or her sense of having been called to the profession. The teacher-as-educator feels passionately driven to add value to the lives of learners. The teacher's heart has been touched, as it were, and that is why he or she has chosen the profession. According to Van der Zee (2012), to be conscious of one's calling forms the basis of authentic teaching-as-education. Authenticity refers to a congruence between one's actions and one's feelings and thoughts. This insight resonates with the notion of integrity, which is one of the key outcomes of educating in a *paideia* spirit.

Conclusion

We set ourselves the task of arguing the following thesis: Irrespective of the extent to which teachers conform to the image of the 'ideal' teacher, and irrespective of how well-trained and qualified teachers might be for their profession as teaching–learning facilitators, they should display two additional qualities in order to not only teach effectively but also to maintain order and discipline in their classroom and school. These two qualities are the ability to see and approach the learner not only as somebody who has to pass a grade, who has to do well in tests and examinations (assessments) and whose achievements, finally, are reflected as a statistic on a scoresheet at the end of the school year – one of the 'passes' or 'fails' of the academic year – and also to see the teaching profession not only as a remunerated occupation but as a calling, a position that attests to a deep level of commitment on the part of the teacher.

We approached this task in an interpretive-constructivist manner by first attending to the legal settings in which teachers are expected to practise. We then argued that order and discipline as legally prescribed are indeed indispensable for effective teaching and learning but not sufficient. We attempted to make the point that much more is needed on the part of the teacher to maintain good order and discipline, particularly a long-term insight into the classical *paideia* ideal and a biblical child-anthropology. It finally transpired that the maintenance of good order and discipline in the classroom depends on the teacher taking responsibility for the future of his or her learners and for the teacher to morph from being 'just' a teacher into teacher-as-educator – a person with a strong sense of having been called to the profession.

There is, as we summed up in the title of this chapter, much more to order and discipline in the classroom and in the school than meets the eye… .

Chapter 9

The effect of discipline on the academic performance of learners: International perspectives from the 2016 Progress in International Reading Literacy Study survey and the implications thereof for South Africa

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Abstract

Learner discipline problems remain a critical issue in South African schools. The data of the 2016 PIRLS pertaining to 61 participating countries give some insight into the effect of the state of discipline in schools on academic performance of learners. The aim of this chapter is to report on the result of calculations made in investigating the effect of school discipline on the academic performance of learners, using the results of the 2016 PIRLS survey. The covariation between reading literacy levels and the state of discipline in schools, as experienced by teachers and principals, was examined. In the case of the experience of learners, a Spearman rank-order correlation coefficient was calculated on the correlation between the reading literacy test results of learners and the state of discipline in their schools assessed by learners in 49 PIRLS participating countries. This correlation was found to be 0.647, signifying a definite positive correlation – that is, the state of learner discipline in schools is a factor affecting the academic achievement of learners.

Introduction

Whilst it is commonplace to assert – as is often done in the scholarly discourse (e.g. Tapala 2020) and public discourse (e.g. Marx 2019:6) alike – that South Africa's education system and institutions are not performing as desired, and two of the most compelling problems or challenges besetting South Africa's schools are those of poor academic performance and learner discipline, the exact relation between these two has never been the subject of serious investigation. The aim of this chapter is to investigate this relationship, making use of the opportunity afforded by the data of the 2016 PIRLS study. The chapter commences with a literature survey of the literature relevant to this study, followed by an explanation of the research methodology used. The findings are then presented and discussed, and conclusions are drawn.

Literature survey

This section surveys the literature relevant to the research theme, which falls into three parts: literature on the poor academic achievement levels in South African schools; literature on learner discipline, particularly in South African schools and literature on the International Association for the Evaluation of Educational Achievement (IEA) tests, the PIRLS in particular.

The poor achievement levels of learners in South African schools

Insight into the achievement levels of learners in South African schools can be gleaned from three sources: the results of the annual matriculation examination; the outcomes of the ANA tests and results of international test series in which South African learners have taken part.

In the most recent matriculation examination (at the time of writing – 2018), the overall pass rate was 78.2%; that means 140 770 of the 790 843 candidates who sat for the examinations failed (Times Live 2019). Twelve schools in the country had a 0% pass rate, up from nine the previous year (Head 2019). Limpopo Province had a 68% pass rate – a figure that drops to a desponding 28% if those candidates who were in Grade 10 but did not progress to Grade 12 are included in the calculation (Head 2019). It should further be kept in mind that the pass requirements are not high and have, in recent years, been lowered. Candidates study seven subjects for the examination. The following subjects are obligatory (Fridie 2019):

- Home Language
- First Additional Language
- Mathematics or Mathematical Literacy
- Life Orientation
- Either English or Afrikaans as one of your languages.

Mathematical Literacy in particular has been the subject of much debate and criticism in public and scholarly circles alike, often being deemed to be not worthy of secondary school-termination examination level (see Graven & Buytenhuys 2011).

In order to gain a certificate passing Grade 12, a candidate has to meet the following requirements (Fridie 2019):

- must obtain at least 40% in his or her Home Language
- must obtain at least 40% in two other subjects
- must obtain at least 30% for four subjects
- must pass at least six out of seven subjects.

To qualify for university admission, a candidate must meet the following requirements (Fridie 2019):

- must obtain at least 40% for his or her Home Language (compulsory)
- must obtain at least 50% for four other subjects, excluding Life Orientation
- must obtain at least 30% in LoLT of the tertiary (higher education) institution
- must obtain at least 30% for one other subject
- must pass at least six out of seven subjects.

The following grades are awarded (Fridie 2019):

- Level 7: 80%–100% (Outstanding achievement)
- Level 6: 70%–79% (Meritorious achievement)
- Level 5: 60%–69% (Substantial achievement)
- Level 4: 50%–59% (Moderate achievement)
- Level 3: 40%–49% (Adequate achievement)
- Level 2: 30%–39% (Elementary achievement)
- Level 1: 0%–29% (Not achieved: Fail).

To summarise, the matriculation examination casts a dark shadow on the academic performance levels of learners in South African schools. The requirements for passing are low (note only at less than 30% does a candidate fail a subject outright), the quality of at least some subjects is dubious, and the pass rates are low (more so if dropouts who do not even go and sit for the examination are taken into account). The quality of the examination and the credibility of the results can also be criticised from both the disadvantage that many candidates are writing the examination in a language which is not their first language, and the upward adaptation of marks of learners who do not write the examination in their first language.

An equally dispiriting picture emerged from the ANA tests that the DBE has been running in recent years. For example, in the 2014 round, only 11%, 48% and 34% of Grade 9 learners could demonstrate the competency level required in, respectively, Mathematics, Home Language and First Additional Language (RSA 2014:41–42). These tests were conducted in South African schools from the mid-1990s, and evidence over the entire timespan indicates that between 60% and 70% of South African schoolchildren were getting to the end of primary school without being able to read, write and do mathematics at an appropriate proficiency level in terms of the official curriculum (Fleisch 2018: 10–11). To illustrate the dismal performance levels of South African learners, the results of research by Fleisch, Pather and Motilal (2017:2) are illustrative. Surveying Grade 4 learners in 100 quintile 1–3 schools (South African schools are categorised in quintiles according to the income levels of parents: quintile 1 schools are schools with the 20% poorest parents, and quintile 5 schools are schools with the 20% most affluent parents) in the Pinetown District of KwaZulu-Natal, the following percentages of respondents could spell the following words correctly: bed: 40.9%, must: 26.4%, thirty: 30.0% and crime: 6.6%.

In international test series – which are being used more in the current era – South Africa stands out because of its extremely poor performance. The two most salient clutches of international test series are those run by the IEA and the Organisation of Economic Cooperation and Development's (OECD) Programme for International Student Assessment (PISA). Whilst South Africa's participation in the IEA tests has been sparse and in the PISA tests thus far non-existent, each time South African learners did participate in the IEA tests, the results were invariably amongst the poorest. Two well-known test series run by the IEA every few years are the Trends in International Mathematics and Science Study (TIMSS) and PIRLS. Trends in International Mathematics and Science Study is an international assessment whereby learners from the same grades from different countries take the same mathematics and natural science tests. Grade 4 and Grade 8 learners take these tests. Trends in International Mathematics and Science Study was for the first time done in South Africa in 1995 and South Africa has participated again in 1999, 2003, 2011 and 2015. Approximately 12 500 learners and 330 mathematics and science teachers from 292 schools took part in the study. In the 2015 round of TIMSS, 50 countries and seven jurisdictions (countries, states or provinces) participated in TIMSS. In total, more than 580 000 students wrote the TIMSS 2015 tests (see Reddy 2018).

In the Grade 4 Mathematics test, South Africa ended second-last. South African learners got 376 (Mullis et al. 2017b:22). Only Kuwait (353) scored lower. Singapore and Hong Kong came out tops and second, 618 and 615, respectively. The Netherlands got 530, Germany 522 and Australia 517 (the TIMSS tests are scored norm-referenced, where the average of all the countries are allocated 500 marks). In the PIRLS tests, the outcome for South Africa is as bleak. As this study is based on the latest PIRLS test results, these results are discussed in more detail later in this chapter.

Scholarly literature on learner discipline in schools, internationally and in South Africa

Whilst lamentably not high on the international education research agenda – despite being a problem worldwide – the scholarly literature on learner discipline in schools can be divided into the following five categories: literature on the state of learner discipline; the causes or correlates of learner discipline (problems) in schools; types of learner discipline problems in schools; the effect of learner discipline problems and the handling of learner discipline problems or the maintenance of sound learner discipline in schools.

In respect of the state of learner discipline in schools, studies often include information or data on this. Typically, the perceptions or experiences of learners, teachers or principals are reported. It should be noted that measuring this objectively and precisely is difficult and such statistics are, therefore, not readily available. To form a valid assessment of the state of learner discipline in South African schools – from a study limited in scope (both by means of sample and instrument probing the state of learner discipline) – is, therefore, fraught with difficulties. However, findings that indicates beyond reasonable doubt that there is reason for concern about the state of learner discipline in South African schools emanates from the report of the 2016 PIRLS study, which formed the database of this study. Grade 4 learners, as respondents, in 60 participating countries were asked how often they experienced bullying at the hands of other learners. Thirty-two percent of South African respondents indicated weekly, the highest of all the PIRLS participating countries (Mullis et al. 2017a:225). By comparison, the figure for the United States of America was 15%, for England 15% as well, for the United Arab Emirates 25% and for New Zealand 24% (Mullis et al. 2017a).

Turning to the determinants of the state of learner discipline in schools, in the published literature, six sets of causal factors (or at least correlates of) the state of learner discipline in schools can be identified, namely 'learner-bound factors, teacher-bound factors, school-bound factors, parent-bound factors, society-bound factors, and education system-bound factors' (see Wolhuter & Van der Walt 2020:2). The first set of factors that has a bearing on the incidence and nature of disciplinary problems in schools are learner-bound factors – for example, the age of learners, or their life stage. Discipline problems manifest with higher 'rates of incidence' (see Wolhuter & Russo 2013:5) and tend to be of a more serious kind at secondary school level than at primary school level (Wolhuter, Oosthuizen & Van Staden 2010). Then, in the second instance, 'teacher-related factors' – for example, the level of competency of a teacher, the gender of the teacher, the extent to which the teacher is a 'role model for learners' (Wolhuter, Van der Walt & Potgieter 2013:10) and 'teacher–learner relationships' – also have a bearing on the 'state of learner discipline' (Department of Education and Science and the Welsh Office 1989:67–72; Wolhuter & Van Staden 2009). Thirdly, school-related factors – including school management features, school leadership, school infrastructure, class size (i.e. student–teacher ratio), organisation culture and organisational climate at a school – all affect the 'state of learner discipline' in schools (Van der Westhuizen, Oosthuizen & Wolhuter 2008; Vos 2020). The fourth set of factors pertain to 'parental involvement' (cf. Wolhuter & Steyn 2003:531) in and support of schools, parental modelling and child-raising styles, and practices at home (Wolhuter & Van der Walt 2020). Fifth, 'society-related factors' (see Van der Walt, Potgieter & Wolhuter 2009) – that is, the nature of society and the community in which the school finds itself – influence the state of learner discipline in a school. For example, the lack of 'social capital in South African society' (Van der Walt et al. 2009:40–41) has been pointed out as detrimental to the maintenance of good learner discipline in South African schools.

The final 'set of factors relate to the education system' is formulated in a recent publication as follows (Wolhuter, De Wet & Van der Walt 2019):

> The (national) education system of a country sets in place the structural environment and parameters (as is evident in the governance in circuits, districts, provincial and national offices) for particularly the teacher- and school-related factors enumerated above, such as teacher competency, school infrastructure, authority, autonomy, and the morale of the teachers in the system. (p. 203)

Research on the effects of learner discipline problems have thus far concentrated on the effect of learner discipline problems on teachers (especially) (e.g. Wolhuter & Van Staden 2008) and on learners (e.g. Wolhuter & Oosthuizen 2003). It should be highlighted that empirical research has revealed that 85% of teachers reported that learner discipline problems made them sometimes or regularly unhappy in their work; 91% reported that learner discipline problems have regularly or at times caused stress in their family lives; 90% reported that learner discipline problems resulted at times or regularly in them experiencing health problems and 81% reported that learner discipline problems made them at times or regularly to consider leaving the teaching profession (Wolhuter & Van Staden 2008:397).

Regarding the handling of learner discipline problems, empirical research amongst teachers has shown that, whilst teachers do have at their disposal, do know and do use a wide range of both proactive and retroactive methods of maintaining sound learner discipline, they find that these are ineffective (Serame et al. 2013; Wolhuter & Van Staden 2008). Earlier, teachers in South Africa relied strongly on corporal punishment to maintain discipline, and with corporal punishment outlawed a generation ago, they now seem to be at a loss as to how to maintain learner discipline in their classrooms.

To summarise, a wide range of studies have been conducted on learner discipline, including on South African soil. Regarding the effect of learner discipline problems, such research has thus far concentrated on the effect of such problems on the lives of teachers and learners. What lacks is research on the effect of learner discipline problems on the academic achievement levels of learners. The research reported in this chapter is an opening bid to fill this lacuna.

The International Association for the Evaluation of Educational Achievement and Progress in International Reading Literacy Study tests

The IEA was founded in 1959 and is an international collaborative forum between 'national research institutes, governmental research agencies, scholars and analysts' (IEA 2019) endeavouring to research, understand and improve education globally. The IEA (2019) conducts 'high-quality, large-scale survey studies of education across the globe' and high-quality, large-scale comparative studies of education across the globe in order to provide educators, policymakers and parents with insights into how students perform (IEA 2019).

Progress in International Reading Literacy Study (one of the core studies of IEA) is directed by the TIMSS and PIRLS International Study Center at Boston College and has been conducted every five years since 2001 (i.e. 2001, 2006, 2011, and most recently 2016, with another round planned for 2021). The International Study Center of PIRLS and TIMSS is held as the international benchmark for measuring trends in reading achievement at grade four level. Progress in International Reading Literacy Study yields internationally 'comparative statistics as to the reading proficiency of children' (PIRLS & TIMSS 2019) and supplies policy-valuable information for raising learning and teaching skills. The study is taken at a key transition stage in children's reading development: changing from learning to read to reading to learn. Measuring reading proficiency at this critical stage 'provides educators and policy makers with key insights into the effectiveness of their education system and helps to identify areas for improvement' (PIRLS & TIMSS 2019; IEA 2019).

The following 61 countries or jurisdictions participated in the 2016 PIRLS exercise: Argentina (Buenos Aires), Australia, Austria, Azerbaijan, Bahrain, Belgium (Flemish), Belgium (French), Bulgaria, Canada (Ontario, Quebec), Chile, Chinese Taipei, Czech Republic, Denmark, Egypt, England, Finland, France, Georgia, Germany, Hong Kong Special Administrative Region, Hungary, Iran, Ireland, Israel, Italy, Kazakhstan, Kuwait, Latvia, Lithuania, Macao Special Administrative Region, Malta, Morocco, Netherlands, New Zealand, Northern Ireland, Norway, Oman, Poland, Portugal, Qatar, Russian Federation, Saudi Arabia, Singapore, Slovak Republic, Slovenia, Spain, Sweden, Trinidad, Tobago, the United States of America, the Russian

Federation (Moscow City), the Republic of South Africa (English or Afrikaans or Zulu), Spain (Andalusia, Madrid) and the United Arab Emirates (Abu Dhabi, Dubai).

Besides an extensive report containing the results of the survey, the principals of this exercise also published an *Encyclopedia: Education Policy and Curriculum in Reading* (Mullis et al. 2017a), containing detailed information on the education system and societal context of each participating jurisdiction, including the structure of each education system, the reading curricula in the primary grades, and overall policies related to reading instruction. This is a valuable document when interpreting the results of the exercise and doing comparative analyses. A total of 12 810 South African learners took the PIRLS 2016 test (Mullis et al. 2017a:309). In addition to the PIRLS tests, a host of other features of participating schools were surveyed, including (and significant for this chapter) reports about principals' views of the state of discipline in their schools, teachers' experience as to how safe and orderly their schools were and learners' experience of bullying in their schools. The PIRLS test results were graded the same way as the TIMSS tests, as explained above (i.e. norm-referenced, with 500 being the midpoint).

In recent decades, a seismic shift has taken place in the environment in which scholars of the social sciences – and those in the education sciences in particular – do their work. In the context of globalisation, neoliberal economics knowledge economies (i.e. economies where the making and use of new knowledge have become the axial principle of economies) have arisen. Knowledge economies in a globalised world are characterised by cut-throat competition for global talent. This has given human capital theory and the role of education new importance. The information and communication technology revolution – which makes possible the collection, analysis and storage of mass volumes of data – has resulted in a variety of international, uniform data collection exercises, leading to mass databases. These include not only the datasets generated by IEA surveys but also those derived from PISA tests of the OECD and the whole industry around the international ranking of universities (see eds. Shin, Toutkoushian & Teichler 2011; Wolhuter 2012).

The availability of mass datasets has undeniably been opening new vistas for social science scholarship, and whilst the place they have been assigned in social science scholarship has not been without its critics (e.g. Forestier & Adamson 2019; eds. Meyer & Benavot 2013), they have also excited other scholarship that sees them as a promising development (e.g. Delva 2019). This has also had a powerful effect on the shaping of education policy.

To summarise, a substantial body of research on learner discipline in schools has been accumulating over the past decades, both internationally and in South Africa. These cover the causes or antecedents of learner discipline problems, the state of learner discipline at schools and the type of problems experienced, the effect of learner discipline problems and the handling thereof. Research on the effect of learner discipline problems has focused on the effect thereof on the well-being of learners and especially that of teachers. However, research on the relation between the state of learner discipline and the academic achievement of learners – the core business of schools – has thus far escaped the attention of scholars.

■ Research methodology

To explain and motivate the methodology followed in this research, the scheme of Robson (2011) is used. Robson distinguishes between three categories or levels of research methods:

- methods of data collection
- methods of data analysis
- methods of data interpretation.

Research begins with a data collection exercise. Thereafter, the collected data should be analysed in order to reduce them to sensible proportions – that is, to summarise and to order or organise them. After having summarised the data into manageable, understandable proportions, the scholar proceeds to the next step, namely to attaching a particular meaning or understanding or explanation to the analysed data – that is, the data are interpreted. For each of these levels, several methods are available.

The method of data collection used in this research was that of tapping into the 2016 PIRLS study's results – that is, survey (albeit indirect survey) and test measurement research. Whilst survey research has its advantages and limitations (see Black & Champion 1976:379), as does the measurement of variables (see Mukwambo, Ngconza & Chikunda 2015), and sampling, too, has its quota of problems (see Lumadi 2015), International Large Scale Assessment Data (also known as ILSA) has grown into a massive global industry, involving not only scholars but also a host of other actors, such as policymakers (see Kamens & McNeely 2009; Lindblad, Petterson & Popkewitz 2015; Molstad, Petterson & Forsberg 2017).

Turning to the processing of data, the *t*-test was resorted to. Besides publishing the average reading test results, per country, of learners taking the test, the test surveyed principals of participating schools regarding the state of discipline in their schools (Mullis et al. 2017a:220). Principals were given three categories to choose from: hardly any problems; minor problems and moderate to severe problems.

The mean test scores, as well as the standard deviation per country, per category (as placed by principals), are available (Mullis et al. 2017a:220–221). A *t*-test was done to measure whether there are any significant differences (95% confidence level) in each country between the scores of schools with hardly any problems and schools with minor problems; between schools with minor problems and schools with moderate or severe problems; and between schools with hardly any problems and schools with moderate or severe problems.

Teachers of participating schools were also surveyed as to how safe and orderly their schools were in their view (Mullis et al. 2017a:223–224). They were given three responses to choose from: very safe and orderly; somewhat safe and orderly; and less than safe and orderly. Results were published together with the means and standard deviation in reading performance of each group, and a similar *t*-test was run.

Finally, participating learners were surveyed as to how often they experienced bullying in their schools and could choose from three responses: almost never; about monthly and about weekly. Results were also published as together with the average and standard deviation of the reading scores of each group, and a similar *t*-test was run.

At interpretation level, the method of comparative education was turned to. Whilst a number of views exist as to how to exactly define comparative education, for the purpose of this chapter, it is used with the meaning defined by Wolhuter et al. (2018) as studying education from a three-in-one perspective (see also Wolhuter 2015:24–26; as well as the application of this 'definition' in Chapter 5 of this collected work, Wolhuter & Van der Walt, 2021):

- an education *system* perspective
- a contextual perspective
- comparative perspective.

Firstly, the focus of the study of comparative education is on the education *system* – that is the first perspective. In the research in this chapter, the 57 national education systems, as well as the education systems of the other seven jurisdictions which participated in the PIRLS study, are involved. Secondly, the scope of comparative education is more than only the education system as such (see again ch. 5 of this collected work). From such comparisons, statements about education systems and their societal interrelations are made.

Results

Overall findings

The average achievement levels of learners in the various countries which participated in the 2016 PIRLS exercise are presented in Table 9.1.

TABLE 9.1: Average achievement levels of learners in the various countries which participated in 2016 Progress in International Reading Literacy Study.

Rank order	Country	Score
1.	Russia	581
2.	Singapore	576
3.	Hong Kong	569
4.	Ireland	567
5.	Finland	566
6.	Poland	565
7.	Northern Ireland	565
8.	Norway	559
9.	Taipei, Taiwan	559
10.	England	559
11.	Latvia	558
12.	Sweden	555
13.	Hungary	554
14.	Bulgaria	552
15.	United States of America	549
16.	Lithuania	548
17.	Italy	548
18.	Denmark	547
19.	Macao	546
20.	Netherlands	545
21.	Australia	544
22.	Czech Republic	543
23.	Canada	543
24.	Slovenia	542
25.	Austria	541
26.	Germany	537
27.	Kazakhstan	536
28.	Slovak Republic	535
29.	Israel	530
30.	Portugal	528

Source: Mullis et al. (2017a:20).

Table 9.1 continues on the next page →

TABLE 9.1 (Continues...): Average achievement levels of learners in the various countries which participated in 2016 Progress in International Reading Literacy Study.

Rank order	Country	Score
31.	Spain	528
32.	Belgium, Flemish-speaking	525
33.	New Zealand	523
34.	France	511
35.	Belgium, French-speaking	497
36.	Chile	494
37.	Georgia	488
38.	Trinidad and Tobago	479
39.	Azerbaijan	472
40.	Malta	452
41.	United Arab Emirates	450
42.	Bahrain	446
43.	Qatar	442
44.	Saudi Arabia	430
45.	Iran	428
46.	Oman	418
47.	Kuwait	393
48.	Morocco	358
49.	Egypt	330
50.	South Africa	328

Source: Mullis et al. (2017a:20).

The first striking observation, from a South African vantage point, is that, of all participating countries, South Africa is in the absolute last place. Secondly, the range of scores is fairly large: from 552 to 328; percentage-wise, the last is not even 60% of the top.

To find reasons or correlates of or explanations for scores is at the same time easy and difficult. It is easy in the sense that, to do a correlation calculation (of the Pearson product-moment, or Spearman rank-order, or even a Kendal concordance coefficient of multiple correlation kind or to do a regression analysis), would be easy, also to obtain significant correlation coefficients. At the same time, no single correlate or reason would be deterministic. In regression analysis, large residuals and standards errors from the mean would be common. This brings home the message any scholar of comparative and international education would table as an automatic reflex, namely that education systems are shaped by their contextual ecologies; these contextual elements or forces have between them an interplay, making the isolation of the effect of one of them extremely difficult. Or, to bring it closer home, when studying the causes of achievement levels at school, the configuration of a myriad contextual forces are at play and the interrelationships between them render the calculation of the effect of any single one of them well-nigh impossible.

To complicate matters more, when dealing with the achievement levels of learners, apart from societal contextual factors, a host of other sets of contaminating factors are at play. These sets of factors include education system factors, school-specific factors, teacher- and class-specific factors (of which discipline in the classroom is but one), learner-related factors, and parents and family background factors.

In addition to the complexity in causal factors, the second factor to bear in mind when interpreting the results of the PIRLS exercise is that these figures refer to national averages or aggregates (or, even more accurately, to averages or aggregates extrapolated from samples, as best as possible put together to be nationally representative). Whilst intranational school variation may be present in the superlative in South Africa (the saying goes ‘there is as much a typical South African school as there is a typical South African hairstyle’), no national education system contains a set of identical schools. There are some 14 500 public primary schools in South Africa. It is generally known that a sharp rift lies between, on the one hand, the former white (or ex-model C schools), representing some 20% of schools in South Africa (and being attended by the majority of white children, as well as substantial numbers of Indian and mixed race learners, as well as black children from middle-class families) and the historically black schools, on the other hand. The former category is not only much better endowed financially as well as teacher-wise and infrastructure-wise, but the achievement levels of their learners are also substantially better than those of the latter category schools. Whilst data on the PIRLS scores of learners in these two categories of schools are not available, the following statistics can give some idea of the variations in the PIRLS results inside South Africa and also give some more information as to the position of South African learners in the international spectrum of the PIRLS results. In South Africa, the language of learning and instruction during the first three school grades tends to be the mother tongue of the majority of learners. As from Grade 4, the medium of instruction is either English or Afrikaans. Learners who sat for the PIRLS test did so in their LoLT as per Grade 3. The percentages of South African learners per home language who wrote the PIRLS test and who obtained the low benchmark score or higher were as follows: Afrikaans: 44%; English: 43%; Sesotho: 18%; siSwati: 16%; isiNdebele: 13%; isiZulu: 13%; Xitsonga: 12%; isiXhosa: 12%; Tshivenda: 11%; Setswana: 10% and Sepedi: 7% (Howie et al. 2017). These figures show the huge gap between the two categories of schools. It should be noted that even for those learners from privileged (family and school) backgrounds – that is, those who wrote the test in English and Afrikaans – the results, from an international perspective, are by no means impressive. Not even half of these learners could achieve a low benchmark level.

Experiences of principals

The PIRLS results per group of schools according to the state of discipline at schools as assessed by principals for the various participating countries are presented in Table 9.2.

From Table 9.2, it is clear that there is a trend for reading achievement scores to decrease as the state of discipline in schools (at least as measured in the assessments of principals) deteriorates. This trend holds for all education systems across continents and across the development spectrum. However, not

TABLE 9.2: Covariation between the Progress in International Reading Literacy Study results and the state of discipline in schools as assessed by principals.

Countryor jurisdiction	**Average achievement: schools with hardly any discipline problems**	**Average achievement: schools with minor discipline problems**	**Average achievement: schools with moderate to severe discipline problems**	***P*-value of *t*-test comparing schools with hardly any discipline problems with schools with minor discipline problems (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing schools with hardly any discipline problems with schools with moderate to severe problems (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing schools with hardly any discipline problems with schools with minor problems (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**
Hong Kong	571	547	(No schools)	0.023*	–	–
Macao	548	531	(No schools)	0.00*	–	–
Northern Ireland	566	557	(No schools)	0.420	–	–
Kazakhstan	538	520	537	0.184	1.00	1.00
Lithuania	549	548	(No schools)	0.874	–	–
Ireland	571	550	(No schools)	0.022*	–	–
England	563	539	(No schools)	0.00*	–	–
Finland	567	564	(No schools)	0.568	–	–
Taipei	560	557	(No schools)	0.570		
Georgia	490	492	479	1.00	0.840	0.380
Spain	531	520	505	0.090	0.330	
Czech Republic	545	539	(No schools)	0.260		–
Azerbaijan	467	496	461	1.00	1.00	0.00*
United Arab Emirates	463	423	392	0.00*	0.00*	0.00*
Latvia	564	574	(No schools)	0.001*	–	–
Bahrain	454	429	424	0.001*	–	0.003*

Note: asterisk (*) indicates significant differences at 95 % level of confidence.

Table 9.2 continues on the next page →

TABLE 9.2 (Continues...): Covariation between the Progress in International Reading Literacy Study results and the state of discipline in schools as assessed by principals.

Countryor jurisdiction	**Average achievement: schools with hardly any discipline problems**	**Average achievement: schools with minor discipline problems**	**Average achievement: schools with moderate to severe discipline problems**	***P*-value of *t*-test comparing schools with hardly any discipline problems with schools with minor discipline problems (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing schools with hardly any discipline problems with schools with moderate to severe problems (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing schools with hardly any discipline problems with schools with minor problems (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**
Norway	562	554	(No schools)	0.109	–	–
Russian Federation	580	583	(No schools)	1.00	–	–
New Zealand	539	497	(No schools)	0.00*	–	–
Bulgaria	562	532	521	0.014*	–	0.752
Canada	550	532	(No schools)	0.00*	–	–
Australia	556	525	475	0.00*	0.00*	–
Singapore	580	569	(No schools)	0.145	–	–
Slovak Republic	542	531	420	0.520	–	0.00*
Qatar	443	450	403	1.00	0.00*	0.00*
United States of America	561	529	520	0.00*	0.00*	–
Belgium (Flemish)	531	515	(No schools)	0.003*	–	0.005
Iran	443	406	390	0.014*	0.015*	0.003*
Belgium (French)	503	495	461	0.517	0.003*	0.151
Malta	459	441	446	0.00*	0.181	0.659
Italy	550	547	543	1.00	0.649	0.00*
Hungary	565	542	512	0.001*	0.00*	1.00

Note: asterisk (*) indicates significant differences at 95 % level of confidence.

Table 9.2 continues on the next page →

TABLE 9.2 (Continues...): Covariation between the Progress in International Reading Literacy Study results and the state of discipline in schools as assessed by principals.

Countryor jurisdiction	**Average achievement: schools with hardly any discipline problems**	**Average achievement: schools with minor discipline problems**	**Average achievement: schools with moderate to severe discipline problems**	***P*-value of *t*-test comparing schools with hardly any discipline problems with schools with minor discipline problems (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing schools with hardly any discipline problems with schools with moderate to severe problems (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing schools with hardly any discipline problems with schools with minor problems (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**
Slovenia	543	542	544	1.00	1.00	0.060
Portugal	534	523	501	0.023*	0.006*	0.00*
Israel	548	520	475	0.002*	0.00*	0.038*
Sweden	562	548	522	0.021*	0.038*	0.012*
France	519	508	484	0.073	0.012*	–
Denmark	552	543	(No schools)	0.040*	–	0.00
Chile	506	490	447	0.07	0.00*	0.00*
Saudi Arabia	455	416	393	0.00*	0.00*	0.01*
Austria	548	536	509	0.036*	0.007*	0.326
Netherlands	551	543	498	0.110	0.326	0.045*
Germany	553	529	489	0.00*	0.004*	–
Poland	569	562	(No schools)	0.42	–	0.014*
Oman	430	425	407	0.137	0.014*	0.067
Kuwait	413	388	378	0.201	0.067	0.019*
Trinidad and Tobago	497	481	462	0.263	0.019*	0.045*
Egypt	356	336	314	0.809	0.045*	0.002*
South Africa	348	319	295	0.165	0.002*	0.959
Morocco	368	354	357	1.00	9.59	–

Note: asterisk (*) indicates significant differences at 95 % level of confidence.

all these differences are significant. In Table 9.3, the countries where differences are significant and those where they are not, are enumerated.

In interpreting Table 9.3, it should be remembered, as explained above, that education systems are shaped by societal contextual forces. Furthermore, achievement levels of learners in an education system are also determined by education system

TABLE 9.3: Jurisdictions where significant differences were registered versus jurisdictions where no significant differences were registered.

Jurisdictions where significant differences were registered	Jurisdictions where no significant differences were registered
Hong Kong	Northern Ireland
Macao	Kazakhstan
Ireland	Lithuania
England	Finland
Azerbaijan	Taipei
United Arab Emirates	Georgia
Latvia	Spain
Bahrain	Czech Republic
Bulgaria	Norway
New Zealand	Russian Federation
Canada	Singapore
Australia	Slovakia
Slovakia	Morocco
Qatar	
United States of America	
Belgium (Flemish-speaking)	
Iran	
Belgium (French-speaking)	
Malta	
Italy	
Hungary	
Portugal	
Israel	
Sweden	
France Denmark	
Chile	
Saudi Arabia	
Austria	
Netherlands	
Poland	
Germany	
Kuwait	
Trinidad and Tobago	
Egypt	
South Africa	

features (see Wolhuter & Van der Walt 2018). To complicate matters, these (societal and education system) contextual features themselves are in interplay. Thus, it would be difficult or highly unlikely to single out one or a set of factors deterministically, universally to determine the bearing of the state of discipline on learner achievement levels. What looms up here as an attractive heuristic is Ludwig Wittgenstein's concept of 'family resemblances' ('*Familie Ähnlichkeit*'). This notion means that what can be thought of as having one significant property in common, may in fact be related to a host of overlapping similarities where no single of these related properties is common to all cases. In the complicated subject of investigation of the field of scholarship of comparative and international education – namely, education systems (with their complex of interrelated elements), shaped by an ecology of contextual societal forces (numerous and also mutually interrelated) – the idea of family resemblances appears as a useful heuristic device, which scholars in the field have not yet given thought of employing. It appears from Table 9.3 that 'risk factors' which will cause the state of discipline to significantly affect reading achievement levels of learners include countries with rather low aggregate levels of reading achievement scores and countries with diverse, recent immigrant-rich populations.

In the case of South Africa, the state of discipline (as assessed by principals) does appear to be a factor covarying significantly with learner achievement levels.

Experiences of teachers

The PIRLS results per group of schools according to the state of safety at schools as experienced by teachers for the various participating countries are presented in Table 9.4.

Going by the experience of teachers, too, the trend is a negative covariation between how safe schools are and the reading achievement of learners. However, as in the case of the experience of the principals, not all differences are significant.

TABLE 9.4: Covariation between the Progress in International Reading Literacy Study results and the state of safety in schools as experienced by teachers.

Country or jurisdiction	**Average achievement: schools experienced as very safe and orderly**	**Average achievement: schools experienced as somewhat safe and orderly**	**Average achievement: schools experienced as less than safe and orderly**	***P*-value of *t*-test comparing schools experienced as very safe and orderly with schools experienced as somewhat safe and orderly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing schools experienced as very safe and orderly with schools experienced as less than safe and orderly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing schools experienced as somewhat safe and orderly with schools experienced as less than safe and orderly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**
Hong Kong	571	565	(No schools)	0.311	–	–
Macao	548	535	(No schools)	0.0001*	–	–
Northern Ireland	567	547	(No schools)	0.01*	–	–
Kazakhstan	536	537	(No schools)	1.00	–	–
Lithuania	550	539	(No schools)	0.8464	–	–
Ireland	570	555	(No schools)	0.008*	–	–
England	562	534	(No schools)	0.0002*	–	–
Finland	569	565	(No schools)	0.8845	0.2216	0.8505
Taipei	554	523	(No schools)	1.00	–	–
Georgia	491	479	(No schools)	0.164	–	–
Spain	532	517	(No schools)	0.0006*	–	–
Czech Republic	548	541	(No schools)	0.0801	–	–
Azerbaijan	473	471	(No schools)	0.828	–	–
United Arab Emirates	469	411	(No schools)	0.0001*	–	–
Latvia	559	556	(No schools)	0.4498	–	–

Source: Compiled from IEA (2019).
Note: Asterisk (*) indicates significant differences at 95 % level of confidence.

Table 9.4 continues on the next page →

TABLE 9.4 (Continues...): Covariation between the Progress in International Reading Literacy Study results and the state of safety in schools as experienced by teachers.

Country or jurisdiction	**Average achievement: schools experienced as very safe and orderly**	**Average achievement: schools experienced as somewhat safe and orderly**	**Average achievement: schools experienced as less than safe and orderly**	***P*-value of *t*-test comparing schools experienced as very safe and orderly with schools experienced as somewhat safe and orderly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing schools experienced as very safe and orderly with schools experienced as less than safe and orderly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing schools experienced as somewhat safe and orderly with schools experienced as less than safe and orderly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**
Bahrain	460	422	420	0.0003*	–	–
Norway	562	549	(No schools)	0.030*	–	–
Russian Federation	581	580	(No schools)	0.8492	–	–
New Zealand	536	497	(No schools)	0.0001*	–	–
Bulgaria	563	530	(No schools)	0.0006*	–	–
Canada	548	538	497	0.0104*	0.0078*	0.0479*
Australia	551	526	(No schools)	0.0001*	–	–
Singapore	578	573	(No schools)	0.4661	–	–
Slovak Republic	542	530	472	0.1618	0.1293	0.2856
Qatar	444	432	(No schools)	0.2231	–	–
United States of America	563	531	517	0.0003*	0.0003*	0.6476
Belgium (Flemish)	533	521	488	0.0056*	0.007*	0.0233
Iran	433	417	435	0.4622	1.00	1.00
Belgium (French)	507	496	466	0.1066	0.0004*	0.0147*
Malta	459	449	436	0.0080*	0.0005*	0.0922
Italy	566	548	523	0.3162	0.0507	0.2047
Hungary	563	548	497	0.0679	0.0014*	0.0196*

Source: Compiled from IEA (2019).

Note: Asterisk (*) indicates significant differences at 95 % level of confidence.

Table 9.4 continues on the next page →

TABLE 9.4 (Continues…): Covariation between the Progress in International Reading Literacy Study results and the state of safety in schools as experienced by teachers.

Country or jurisdiction	**Average achievement: schools experienced as very safe and orderly**	**Average achievement: schools experienced as somewhat safe and orderly**	**Average achievement: schools experienced as less than safe and orderly**	***P*-value of *t*-test comparing schools experienced as very safe and orderly with schools experienced as somewhat safe and orderly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing schools experienced as very safe and orderly with schools experienced as less than safe and orderly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing schools experienced as somewhat safe and orderly with schools experienced as less than safe and orderly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**
Slovenia	545	546	555	0.8609	1.00	1.00
Portugal	532	519	(No schools)	0.0044*	–	–
Israel	531	532	(No schools)	1.00	–	–
Sweden	564	551	512	0.0124*	0.0003*	0.0067
France	521	507	482	0.0245*	0.003*	0.0045*
Denmark	554	539	546	0.0015*	–	–
Chile	510	491	435	0.0047*	0.0003*	0.0003*
Saudi Arabia	439	414	385	0.1038	0.0003*	0.2664
Austria	547	532	(No schools)	0.0019*	–	–
Netherlands	549	535	(No schools)	0.0052*	–	–
Germany	554	524	461	0.0003*	0.0052*	0.1064
Poland	566	562	(No schools)	0.3616	–	–
Oman	421	411	(No schools)	0.2288	–	–
Kuwait	398	387	(No schools)	0.2935	–	–
Trinidad and Tobago	493	474	464	0.597	0.0926	1.00
Egypt	340	313	(No schools)	0.03636*	–	–
South Africa	326	319	314	1.00	1.00	1.00
Morocco	385	333	333	0.0003*	0.0003*	1.000*
United Arab Emirates	469	411	(No schools)	0.0001*	–	–

Source: Compiled from IEA (2019).

Note: Asterisk (*) indicates significant differences at 95 % level of confidence.

This trend, too, holds for all education systems across continents and across the development spectrum. However, not all these differences are significant. In Table 9.5, the countries where differences are significant and those where they are not, are enumerated.

It appears from Table 9.5 that, as was the case of the experience of principals, 'risk factors' that would cause the school safety levels to significantly affect reading achievement levels of learners include countries with rather low aggregate levels of reading achievement scores and countries with diverse, recent immigrant-rich populations. In countries with relatively homogenous populations and much social capital, different school safety levels

TABLE 9.5: Jurisdictions where significant differences were registered versus jurisdictions where no significant differences were registered.

Jurisdictions where significant differences were registered	Jurisdictions where no significant differences were registered
Macao	Hong Kong
Northern Ireland	Lithuania
Ireland	Kazakhstan
England	Taipei
Spain	Finland
United Arab Emirates	Georgia
Bahrain	Czech Republic
Norway	Azerbaijan
New Zealand	Latvia
Bulgaria	Russian Federation
Canada	Singapore
Australia	Slovak Republic
United States of America	Iran
Belgium (Flemish-speaking)	Qatar
Belgium (French-speaking)	Italy
Malta	Israel
Hungary	Slovenia
Portugal	Israel
Sweden	Poland
France	Oman
Denmark	Kuwait
Chile	Trinidad & Tobago
Saudi Arabia	South Africa
Austria	
Netherlands	
Poland	
Egypt	
Morocco	

seem not to be a factor significantly affecting reading performance levels of learners. At first sight and inspection, and within the limits of this chapter, it is difficult to detect any definite factor playing a role. Level of affluence of a country, size and location of a country, learners-per-teacher ratios, degree of decentralisation of education or level of school autonomy, and levels of public spending do not appear to stand in a linear relationship with the impact of discipline on learner achievement. Probing and investigating the interrelations between all education systems and societal contextual interrelationships, and how these, in turn, affect the effect of school safety on learners' achievement levels, are beyond the purview of this chapter, but further research in this direction would be a valuable follow-up to this study.

Focusing on South Africa, unlike the case of the experience of principals, this time, probing the experience of teachers, no significant differences were registered in learner achievement between schools of different degrees of safety.

Experiences of learners

The PIRLS results per group of schools according to the incidence of bullying as experienced by learners for the various participating countries are presented in Table 9.6.

In the case of Israel, these data are not available.

In the case of bullying experienced by learners, there is a uniform inverse relationship between the incidence of bullying and achievement in the PIRLS tests, echoing the pattern found in the experiences of teachers regarding school safety and achievement levels and the experience of principals regarding discipline and achievement levels attained in the PIRLS tests. Unlike the previous two measures, however, the differences in the reading scores of learners from different categories are significant in all countries (with the single exception of Iran). I return to this glaring discrepancy in the conclusion of the chapter.

TABLE 9.6: Covariation between the Progress in International Reading Literacy Study results and incidence of bullying in schools as experienced by learners.

Country or jurisdiction	**Average achievement: learners who had almost never experienced bullying**	**Average achievement: learners who had experienced bullying about monthly**	**Average achievement: learners who had experienced bullying about weekly**	***P*-value of *t*-test comparing achievement of learners who had almost never experienced bullying with learners who had experienced bullying about monthly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing learners who had almost never experienced bullying with learners who had experienced bullying about weekly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing learners who had experienced bullying about monthly with learners who had experienced bullying almost weekly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**
Hong Kong	575	563	551	0.0454*	0.003*	0.1797
Macao	555	541	532	0.0003*	0.0003*	0.0003*
Northern Ireland	576	557	531	0.0003*	0.0003*	0.0003*
Kazakhstan	540	527	529	0.0108*	0.0027*	0.7347
Lithuania	560	537	519	0.0003*	0.0003*	0.0119*
Ireland	575	551	526	0.003*	0.0003*	0.0098*
England	569	558	531	0.0036*	0.0003*	0.0003*
Finland	571	557	532	0.0010*	0.0003*	0.0010*
Taipei	565	554	540	0.0070*	0.0003*	0.0080*
Georgia	497	484	439	0.0233*	0.0003*	0.0003*
Spain	536	524	506	0.0003*	0.0003*	0.0008*
Czech Republic	549	541	517	0.0710	0.0003*	0.0003*
Azerbaijan	483	469	429	0.512	0.0003*	0.0003*

Source: Compiled from IEA (2019).
Note: Asterisk (*) indicates significant differences at 95 % level of confidence.

Table 9.6 continues on the next page →

TABLE 9.6 (Continues...): Covariation between the Progress in International Reading Literacy Study results and incidence of bullying in schools as experienced by learners.

Country or jurisdiction	**Average achievement: learners who had almost never experienced bullying**	**Average achievement: learners who had experienced bullying about monthly**	**Average achievement: learners who had experienced bullying about weekly**	***P*-value of *t*-test comparing achievement of learners who had almost never experienced bullying with learners who had experienced bullying about monthly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing learners who had almost never experienced bullying with learners who had experienced bullying about weekly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing learners who had experienced bullying about monthly with learners who had experienced bullying almost weekly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**
United Arab Emirates	477	454	408	0.0003*	0.0003*	0.0003*
Latvia	568	559	534	0.0141*	0.0003*	0.0003*
Bahrain	470	451	417	0.0003*	0.0003*	0.0003*
Norway	564	552	524	0.0207*	0.0003*	0.0006*
Russian Federation	588	578	565	0.008*	0.0003*	0.0086*
New Zealand	541	525	494	0.0004*	0.0003*	0.0003*
Bulgaria	561	546	528	0.0688	0.0003*	0.0669
Canada	554	539	521	0.0003*	0.0003*	0.0003*
Australia	557	544	519	0.0083*	0.0003*	0.0003*
Singapore	590	572	543	0.0003*	0.0003*	0.0003*
Slovak Republic	543	534	502	0.1954	0.0003*	0.0003*
Qatar	469	448	402	0.0003*	0.0003*	0.0003*
United States of America	561	549	521	0.0340*	0.0003*	0.0003*

Source: Compiled from IEA (2019).
Note: Asterisk (*) indicates significant differences at 95 % level of confidence.

Table 9.6 continues on the next page →

TABLE 9.6 (Continues...): Covariation between the Progress in International Reading Literacy Study results and incidence of bullying in schools as experienced by learners.

Country or jurisdiction	**Average achievement: learners who had almost never experienced bullying**	**Average achievement: learners who had experienced bullying about monthly**	**Average achievement: learners who had experienced bullying about weekly**	***P*-value of *t*-test comparing achievement of learners who had almost never experienced bullying with learners who had experienced bullying about monthly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing learners who had almost never experienced bullying with learners who had experienced bullying about weekly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing learners who had experienced bullying about monthly with learners who had experienced bullying almost weekly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**
Belgium (Flemish)	531	523	508	0.0636	0.0003*	0.0005*
Iran	430	430	417	1.00	0.3335	0.5695
Belgium (French)	505	497	484	0.1424	0.0003*	0.0277*
Malta	468	445	415	0.0003*	0.0003*	0.0003*
Italy	554	544	538	0.0270*	0.0017*	0.6510
Hungary	563	546	524	0.0016*	0.0013*	0.0045*
Slovenia	548	546	527	1.00	0.0003*	0.0003*
Portugal	533	525	509	0.110	0.0003*	0.0072*
Sweden	562	547	526	0.0005*	0.0003*	0.0074*
France	518	506	476	0.0188*	0.0003*	0.0003*
Denmark	552	543	526	0.0788	0.003*	0.0208*
Chile	506	493	448	0.0076*	0.0003*	0.0003*
Saudi Arabia	543	432	385	0.0094*	0.0003*	0.0003*

Source: Compiled from IEA (2019).
Note: Asterisk (*) indicates significant differences at 95 % level of confidence.

Table 9.6 continues on the next page →

TABLE 9.6 (Continues...): Covariation between the Progress in International Reading Literacy Study results and incidence of bullying in schools as experienced by learners.

Country or jurisdiction	**Average achievement: learners who had almost never experienced bullying**	**Average achievement: learners who had experienced bullying about monthly**	**Average achievement: learners who had experienced bullying about weekly**	***P*-value of *t*-test comparing achievement of learners who had almost never experienced bullying with learners who had experienced bullying about monthly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing learners who had almost never experienced bullying with learners who had experienced bullying about weekly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**	***P*-value of *t*-test comparing learners who had experienced bullying about monthly with learners who had experienced bullying almost weekly (*p*-value of less than 0.05 indicates significant difference at 95% level of confidence)**
Austria	549	535	512	0.0188*	0.0003*	0003*
Netherlands	548	546	525	1.00	0.0003*	0.0003*
Germany	553	537	510	0.0003*	0.0003*	0.0003*
Poland	573	550	523	0.0003*	0.0003*	0.0007*
Oman	437	417	387	0.0009*	0.0003*	0.0003*
Kuwait	437	417	387	0.0009*	0.0003*	0.0003*
Trinidad and Tobago	494	478	462	0.0115*	0.0003*	0.0333*
Egypt	337	325	294	0.6933	0.0105*	0.1468
South Africa	349	332	299	0.0621	0.0003*	0.0003*
Morocco	373	347	325	0.0003*	0.0003*	0.0478*

Source: Compiled from IEA (2019).

Note: Asterisk (*) indicates significant differences at 95 % level of confidence.

In the case of South Africa, too, significant differences were registered in the PIRLS test achievement levels of learners in different categories (of frequency of experiencing bullying). As a measure of how bad the state of discipline in South African schools is, compared to the international norm, the following exercise was carried out. The PIRLS report states which percentage of learners in each participating country rated their experience of bullying as occurring almost never, monthly and weekly. A composite index was calculated in the case of each country by multiplying the percentage of learners who experienced bullying weekly by two and then adding the total to the percentage of learners who experienced bullying monthly. The results are presented in Table 9.7.

TABLE 9.7: Composite index of discipline in schools.

Country	Percentage of learners who reported that they had hardly ever experienced bullying	Percentage of learners who reported that they had experienced bullying almost once a month	Percentage of learners who reported that they had experienced bullying almost once a week	Composite index: (percentage of learners who reported that they had experienced bullying almost once a month) + (percentage of learners who reported that they had experienced bullying almost once a week × 2)
Kazakhstan	77	17	6	29
Czech Republic	62	28	10	48
Taipei	62	27	11	49
Portugal	60	28	12	52
Finland	75	21	5	31
Ireland	74	20	5	30
Hungary	60	31	9	49
Hong Kong	60	29	11	51
Norway	74	21	5	31
South Africa	22	35	42	117
Austria	63	27	11	49
Lithuania	60	30	11	52
Georgia	74	18	8	34
Northern Ireland	59	29	11	51
Netherlands	58	31	10	51
Egypt	72	18	9	36

Table 9.7 continues on the next page →

TABLE 9.7 (Continues...): Composite index of discipline in schools.

Country	Percentage of learners who reported that they had hardly ever experienced bullying	Percentage of learners who reported that they had experienced bullying almost once a month	Percentage of learners who reported that they had experienced bullying almost once a week	Composite index: (percentage of learners who reported that they had experienced bullying almost once a month) + (percentage of learners who reported that they had experienced bullying almost once a week × 2)
Germany	52	32	11	54
Slovak Republic	57	29	14	57
Morocco	57	29	14	57
Poland	72	20	7	34
Bulgaria	56	30	14	58
Slovenia	56	29	15	59
United States of America	56	30	15	60
Italy	55	31	14	59
Azerbaijan	72	26	8	42
Sweden	71	23	6	35
Spain	54	31	15	61
Bahrain	36	32	32	96
Trinidad and Tobago	37	36	27	90
Malta	54	30	16	62
Denmark	67	27	7	44
Saudi Arabia	52	25	33	69
New Zealand	40	36	24	84
Iran	66	23	10	43
Belgium (Flemish)	52	34	13	60
Belgium (French)	42	38	20	78
France	66	26	8	42
England	52	33	15	63
Macao	42	42	16	74
Chile	64	23	13	49
Russian Federation	52	34	14	62
Qatar	43	32	26	74
United Arab Emirates	43	32	25	82
Singapore	50	33	16	65
Latvia	44	35	20	75
Canada	50	33	16	65
Oman	48	32	20	72
Kuwait	48	32	20	72
Australia	46	35	19	73

The countries arranged in rank order according to the composite discipline index are presented in Table 9.8.

TABLE 9.8: Countries arranged in rank order according to the composite discipline index.

Rank order	Country	Composite discipline index
1	Kazakhstan	28
2	Ireland	30
3	Finland	31
3	Norway	31
5	Georgia	34
5	Poland	34
7	Sweden	35
8	Egypt	36
9	Azerbaijan	42
9	France	42
11	Iran	43
12	Denmark	44
13	Czech Republic	48
14	Austria	49
14	Hungary	49
14	Taipei	49
17	Northern Ireland	51
17	Hong Kong	51
17	Netherlands	51
21	Lithuania	52
21	Portugal	52
23	Germany	54
24	Slovak Republic	57
24	Morocco	57
26	Bulgaria	58
27	Slovenia	59
27	Italy	59
29	United States of America	60
29	Belgian (Flemish)	60
30	Spain	61
31	Malta	62
31	Russian Federation	62
33	England	63
34	Chile	64
35	Singapore	65
35	Canada	65

Table 9.8 continues on the next page →

TABLE 9.8 (Continues…): Countries arranged in rank order according to the composite discipline index.

Rank order	Country	Composite discipline index
37	Saudi Arabia	69
38	Oman	72
38	Kuwait	72
40	Australia	73
41	Macao	74
41	Qatar	74
43	Latvia	75
44	Belgium (French)	78
45	United Arab Emirates	82
46	New Zealand	84
47	Trinidad and Tobago	90
48	Bahrain	96
49	South Africa	117

In Table 9.9, the rank orders of the various countries, first as per achievement in the PIRLS test, then as per state of learner discipline (as measured by the above composite index of the experience of bullying), are juxtaposed. A Spearman rank-order correlation coefficient was calculated. The Spearman rank-order correlation coefficient was found to be 0.647, signifying a moderate positive correlation.

TABLE 9.9: Rank orders of countries, per Progress in International Reading Literacy Study test achievement, and per learner discipline index.

Country	Rank order in PIRLS test*	Rank order in composite discipline index	Difference square
Russia	1.	31	900
Singapore	2.	35	1089
Hong Kong	3.	17	196
Ireland	4.	2	4
Finland	5.	3	4
Poland	6.	5	1
Northern Ireland	7.	17	100
Norway	8.	3	25

PIRLS, Progress in International Reading Literacy Study.

Note: Israel is excluded, as no data on Israeli learners' experience of bullying at their schools are available.

Table 9.9 continues on the next page →

TABLE 9.9 (Continues…): Rank orders of countries, per Progress in International Reading Literacy Study test achievement, and per learner discipline index.

Country	Rank order in PIRLS test*	Rank order in composite discipline index	Difference square
Taipei, Taiwan	9.	14	25
England	10.	33	529
Latvia	11.	43	1024
Sweden	12.	7	25
Hungary	13.	14	1
Bulgaria	14.	26	144
United States of America	15.	29	196
Lithuania	16.	21	25
Italy	17.	27	100
Denmark	18.	12	36
Macao	19.	41	484
Netherlands	20.	17	9
Australia	21.	40	361
Czech Republic	22.	13	81
Canada	23.	35	144
Slovenia	24.	27	9
Austria	25.	14	121
Germany	26.	23	9
Kazakhstan	27.	1	676
Slovak Republic	28.	24	16
Portugal	29.	21	64
Spain	30.	30	0
Belgium, Flemish-speaking	31.	29	4
New Zealand	32.	46	196
France	33.	9	576
Belgium, French-speaking	34.	44	100
Chile	35.	34	1
Georgia	36.	5	961
Trinidad and Tobago	37.	47	100
Azerbaijan	38.	9	841
Malta	39.	31	64
United Arab Emirates	40.	45	25
Bahrain	41.	48	49
Qatar	42.	41	1
Saudi Arabia	43.	37	36
Iran	44.	11	1089
Oman	45.	38	49
Kuwait	46.	38	64
Morocco	47.	24	529
Egypt	48.	8	1600
South Africa	49.	49	0

PIRLS, Progress in International Reading Literacy Study.

Note: Israel is excluded, as no data on Israeli learners' experience of bullying at their schools are available.

Conclusion

On all three counts – that is, experiences of principals, teachers as well as learners – discipline is a factor adversely affecting the academic achievement of learners. The fact that South Africa is (in the set of countries which participated in the 2016 PIRLS exercise) in the last place with regard to both discipline and reading achievement is a serious indictment of an alarm bell for South African schools.

Whilst academic achievement covaries with the experiences of principals, teachers, as well as learner discipline, it is most significantly interrelated to the state of discipline as experienced by teachers. This points to the desideratum of research on learner discipline in schools being more based on the experiences of learners than on those of teachers or principals, which thus far has dominated research. Learners are a more accurate barometer on the state of discipline and the effects thereof than teachers or principals.

Chapter 10

Education law perspectives on the application of positive discipline in schools

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Abstract

Section 12(1)(e) of the *Constitution of the Republic of South Africa* and Section 10 of the *South African Schools Act* forbid teachers to punish learners in a painful and inhumane way. Research shows that many teachers still believe that corporal

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punishment is the best strategy for ensuring discipline in schools. Principals and teachers have mixed feelings and lack understanding of the use of positive disciplinary measures. Punitive discipline leads to pain, fear, anger, violence and revenge. Progressive education law principles exist in South Africa to inculcate the culture of positive discipline that leads to a positive teaching and learning environment for teachers and learners. Schools should use positive disciplinary measures to promote a positive teaching and learning environment. Discipline should not be punitive and destructive. Against this background, this chapter provides answers to the following questions: What does positive discipline that creates a positive teaching and learning environment involve? How does the South African education law regulate positive discipline? How can education law be implemented positively to create a positive teaching and learning environment? To address these questions, this chapter provides the principles of positive discipline that are involved in the creation of a positive teaching and learning environment based on an *Ubuntu* theoretical framework. We also analyse education law principles that regulate positive discipline and explain how education law can be implemented in a positive way.

Introduction

An irrefutable prerequisite for the enhancement of sound teaching and learning is vested in an orderly and safe classroom environment. Distractions such as loud talking, shouting, arguments among learners, interruptions, discord between teacher and learners, late-coming and strolling around in class during teaching sessions have a destructive effect on learner concentration. Hence, legal directives such as Section 8 of the *South African Schools Act* 84 of 1996 (hereinafter referred to as the *Schools Act*) (RSA 1996b) were promulgated to facilitate sound teaching and learning. According to Section 8 of the *Schools Act*, ‘A code of conduct must be aimed at establishing a disciplined and purposeful school environment, dedicated to the improvement and maintenance of the quality of the learning process'. A positive discipline approach that is underpinned by the principles of *Ubuntu* is one of the strategies of establishing a disciplined school environment. It should be based on education law. The South African education law steers teachers, learners, parents and other stakeholders in a direction of positive discipline by providing relevant human rights, regulations and guidelines that should be followed when disciplining learners. This law is discussed throughout the chapter.

■ Problem statement

The matter of managing learner discipline is currently of concern to parents, teachers and school principals (Zulu & Wolhuter 2013:11). Moreover, the frequent occurrences and forms of learner misconduct in schools have been under scrutiny for quite some time – especially in the Western World embedded in a human rights culture. In Eastern countries that are still following a more traditional approach to dealing with learner misconduct, the standard tends to be less of a problem (Russo, Oosthuizen & Wolhuter 2015:108).

The question arises as to how learner misconduct can be effectively managed in order to reduce its disrupting effects on the teaching and learning environment in schools and particularly with regard to education in South Africa. Recent international comparative surveys revealed that the quality of local education is in a dismal situation (Oosthuizen 2019:30).

Until about 15–20 years ago, American educational authorities favoured a zero-tolerance approach whereby serious forms of learner misconduct were indiscriminately punished. However, as of late, the tide has been turning in America. The pendulum swing away from a reactive, punitive approach to dealing with learner discipline towards a proactive approach to positive discipline is currently being witnessed (Wachtel 2012:20). A similar trend is seen in South Africa. For more than two decades now, South African educational authorities have been following suit, taking a few steps to the left towards a prospective application of positive discipline in dealing with learner misconduct. The main reason for this appears to be the fact that South Africa adopted a human rights culture with the promulgation of the Constitution of the Republic of South Africa (hereinafter referred to as the Constitution) (RSA 1996a). Some of the statutory directives that effected this swing away from a punitive towards a positive inclination are, for example:

- **Corporal punishment:** Before 1996, in terms of Section 4(1) of the Regulations Relating to the Control of Pupils promulgated in terms of the *Education Affairs Act* of 1988 (RSA 1988), the principal of a school, or his or her delegate, was expected to administer corporal punishment under certain specified conditions. After 1996, it was determined that, in terms of Section 10 of the *Schools Act* (RSA 1996b), teachers and other stakeholders at school may not use any punishment that is painful and cruel to a learner. In addition, this section also determines that any person who does not adhere to this provision will be found guilty and may be sentenced for physical attack (assault).
- **Suspension:** Before 1996, it was determined that, in terms of Section 5(1) of the Regulations Relating to the Control of Pupils promulgated in terms of the *Education Affairs Act* of 1988 (RSA 1988), the principal of a school could suspend a pupil, after consultation with the (then) superintendent of the school, if, in the opinion of such a principal, the pupil's conduct or language was not acceptable, or 'in the opinion of the principal the pupil has committed a reprehensive act'. After 1996, against the background of the current Constitutional provisions, such as Section 29, providing 'everyone' the right to basic education; suspension of a learner currently requires much more of a democratic process. In addition, the *Promotion of Administrative Justice Act* (RSA 2000) also enhanced the

> latter democratic process. In terms of this Act, a member of the public (i.e. a learner) whose rights are materially and adversely influenced by an act of a state organ (i.e. educational authorities or a school) has the right to a procedurally fair hearing. Consequently, the *Schools Act* (RSA 1996b:s. 9[1]) now provides that 'the governing body of a school may, on reasonable grounds as a precautionary measure, suspend a learner who is suspected of serious misconduct from attending school, but may only enforce such suspension after the learner has been granted a reasonable opportunity to make representations to it in relation to such suspension'.

The main problem is, if the proactive approach of positive disciplinary measures is an answer to dealing with learner misconduct to establish a sound teaching and learning environment, we need to determine exactly what it entails in everyday educational praxis. At the same time, we need to determine if it is akin to the South African setting.

Aim of the chapter

The aim of this chapter, embedded in education law, is to amplify the concept and manifestations of positive learner discipline and to harmonise the latter with the expression of *Ubuntu* as reflected in South African case law. In this chapter, the legal perspectives on positive discipline based on the philosophy of *Ubuntu* are explained, the forms of positive discipline are discussed, the negative influences of *Ubuntu* on learner discipline are indicated and practical guidelines on how to apply positive discipline are provided.

Theoretical framework

The philosophy of *Ubuntu* is an old philosophy which has for many centuries been holistically sustaining Africans living in South Africa and Africa. This concept is not easy to define – it is known by human acts based on inherent values and beliefs (Murove 2009:82).

Steve Biko wrote that a human being is important in society: ‘not just his welfare nor his material well-being but just man himself with all his ramifications’ (Biko 1978:6). This is what the philosophy of *Ubuntu* signifies.

Ubuntu underpins the traditional value systems, beliefs and practices of the African way of life. The term essentially entails shared humaneness founded on the root philosophy that man is because of man (*umuntu ngumuntu ngabantu*). In the words of Shutte (2001:25), it implies that ‘persons depend on persons to be persons’. It entails that a person is the basis, centre and the end of everything and existence only makes sense in relation to persons; a ‘shared, reciprocal, humaneness’ emphasising the community and displaying mutual respect towards one another (Murove 2009:66). *Ubuntu* has, among others, been characterised as (Pato 1997):

> [*A*] cultural ethos, a spirituality which is not necessarily better or superior, or for that matter to those of other people, but from which others can learn and improve their understanding of one another. (p. 52)

The philosophy of *Ubuntu* is, therefore, not akin to individualism or an unsympathetic, spiritual way of life. Values of *Ubuntu* call upon us to show a sympathetic attitude towards other members of humankind. The root meaning of the concept of ‘sympathy’ is embedded in its Greek root *sumpatheia* (sun: ‘with + theia’: ‘feeling’). Steve Biko once described this as a kind of social consciousness where humankind with a social cognisance of involvement with an endeavour finds answers to the problems of life (Biko 1978:42). All of these entail that sympathy involves an understanding between people; a favourable attitude towards one another; and support of another in the form of shared feelings (Oxford Dictionary of English 2006:1783).

Mollo (2019:10) argues that the determinants of *Ubuntu* that should be considered during the learner disciplinary process are compassion, human dignity, integrity, respect, solidarity, conformity, collective unity, connectedness, humility, reasonableness, determination, caring, sympathy, empathy, forgiveness, reciprocity and harmony. Some of these determinants of *Ubuntu* are used in the discussion of upcoming sections in this chapter.

Conceptualisation of positive discipline

The forms of positive discipline have been identified based on the definition of the concept itself. Positive discipline, being embedded in welfare, is about shaping the behaviour of children by giving emotional and psychological needs more attention. It helps learners to learn self-discipline without being afraid of what other learners might say (Naker & Sekitoleko 2009:27). A positive discipline approach deals with learner conduct by means of a preventative inclination regulating learner misconduct and unacceptable behaviour (Oosthuizen 2019:145). As Sullivan et al. (2014:53) argue, teachers use approaches that do not solve the basic cause of behavioural disorders; positive discipline becomes a solution, as it focuses on the importance of dealing with the underlying cause of behavioural problems.

Fairness of the disciplinary process (due process)

An unfair disciplinary strategy is unconstitutional and is, for obvious reasons, not positive. Learners understandably do not feel gratified if the format of disciplinary application and/or the disciplinary procedures are not intact. According to Mollo (2015:33), due process refers to the process of ensuring that the disciplinary process that takes place in a school is procedurally and substantively fair. Section 8(5)(a) of the *Schools Act* stipulates that a code of conduct for learners must contain and promote due process to ensure that the spirit of fairness exists in schools. A code of conduct that does not follow due process does not promote positive discipline. Section 9(3)(c) indicates that due process plays a role in protecting the learners' and other role players' interest in the disciplinary process. In this chapter, due process means a fair disciplinary process, which is one of the strategies that promotes positive discipline. Discipline cannot be positive unless it is fair. The court case of *High School Vryburg and the SGB of High School Vryburg v The Department of Education of the North West Province*, which has an element of due process, has been analysed using a case brief which played an important role in the conceptualisation of due process (Mollo 2015:145). Referring to this court case, Mollo (2015:158) argued that teachers and parents should be knowledgeable of due process to be followed in promoting positive discipline in schools.

Positive discipline is a fair strategy that is not intended to affect learners negatively. An infringement of learners' human rights during the disciplinary process leads to negative discipline. Fairness entails that the human rights enshrined in the Constitution such as equality (s. 9); human dignity (s. 10); freedom and security of the person (s. 12); the right to privacy (s. 14); freedom of conscience, religion, thought, belief and opinion (s. 15); freedom of expression (s. 16); the best interest of a child (s. 28); the right to education (s. 29); cultural rights (s. 30 and s. 31); and fair and just administrative action (s. 33) are respected, protected, promoted and fulfilled by, and within, organs of state, such as schools.

■ Positive communication

Positive communication has a dramatic impact on a person's behaviour. It is used in all forms of positive discipline mentioned in this chapter. Teachers who use positive communication are more likely to receive a positive response from learners, and it is easy for them (learners) to co-operate (Flick 2011:175). Communicating positive expectations through a congruent communication model is a good example of positive communication. Congruent communication is discussed below.

Congruent communication

Congruent communication is derived from the two words ‘congruent’ and ‘communication’. Congruent means ‘harmony’, and *communication* is the process whereby information and ideas are exchanged (Concise Oxford English Dictionary 2011:289, 302). For this chapter, congruent communication, therefore, means the process whereby information and ideas are exchanged harmoniously.

Ginnot (1972), one of the fathers of this approach, once stated that:

> [*C*]ongruent communication can transform education. It strikes not just at the trapping of teaching, but at the heart of learning. Yet it has not been tried in our schools. Never has its full force been lavished on children to enrich their personalities and ennoble their lives.
>
> Unlike pilots, architects, or surgeons, teachers are not rigorously trained in the skills of their calling. Somehow they are expected to enter the classroom well versed in the intricacies of human relations. (p. 120)

It seems as if many teachers are still not trained in congruent communication, hence some still communicate negatively with learners when they discipline them. Banzon-Librojo, Garabiles and Alampay (2017:20) argue that 27.9% of learners experience harsh teacher discipline, such as cursing, insulting and shaming. Harsh communication leads to fear, and learners who attend school in an environment that is harsh end up not believing that they will receive assistance from their teachers (Banzon-Librojo et al. 2017:21). Instead, harsh communication leads to hatred and even violence. Padayachie (2013:188) states that effective communication between teachers and learners creates order so that learning and teaching cannot be disturbed.

Setting and communicating clear positive expectations, rules, consequences, routines and procedures

One of the forms of positive discipline is to communicate positive expectations, rules, consequences, routines and procedures. The court case of *High School Vryburg and the SGB of High School Vryburg v The Department of Education of the North West Province* ruled that schools should set expectations that are clear for learners, set up standards of behaviour that are acceptable and make learners aware of the effects of improper behaviour (Mollo 2015:158).

Communicating positive expectations has a serious impact on the academic performance and discipline of a learner (Thakur 2017:318). Thakur argues that communication of expected good behaviour should be directed to all learners and not to high performers only. Stevens (2018:11) advises that positive expectations should be set and communicated at the beginning of the year and learners should be reminded timeously about the expected behaviour. Positive discipline is a strategy whereby teachers discipline learners by communicating with them in a respectful and constructive way.

Value-based discipline

Learners should be taught about values that can contribute to their living a peaceful life in schools. Stakeholders such as teachers, parents, learners and community leaders should be engaged in dialogue in order to introduce a strong value-based discipline that is developed and implemented by all and is guided by universal values where there is a conflict of interest (Du Preez & Roux 2010:24). The involvement of all these stakeholders in the dialogue and development of values that underpin the behaviour of learners indicates collective unity, which is one of the determinants of *Ubuntu*. Teachers should encourage learners to select belief systems that promote positive values. These belief systems should be governed by school governing bodies' policies that have been developed in terms of Section 15 of the Constitution and Section 7 of the *Schools Act* which permit school governing bodies to develop religion policies that regulate practices of religious observances in public schools and ensure that learners and staff members voluntarily attend such observances. In terms of these two sections, religious observance should be conducted on an equitable basis to ensure fairness.

Constructive correction

Thakur (2017:318) mentions 'correcting learners in a constructive way' as another technique of fostering positive discipline. *Correction* means to set the behaviour of learners right (Oxford Thesaurus of English 2009:173). Human dignity is one of the important values and human rights that should underpin the correction process. The correction process would be destructive if a learner is corrected in a manner that displays hatred, revenge, inhumanity or lack of respect. The Centre for Justice and Crime Prevention (CJCP) (2012) states that constructive (positive) discipline:

> [*E*]mphasises the educator's role in building learners' self-esteem and confidence, developing independence, and fostering their sense of self-efficacy. Rather than punishing learners' academic or behavioural mistakes, the teacher explains, demonstrates and models the concepts and behaviours to be learned. Rather than trying to control learners' behaviour, the teacher seeks to understand it and to guide it in a positive direction. (p. 12)

Correction is done by providing proper guidance. Teachers should remember that constructive (positive) correction should not infringe human rights such as equality, human dignity, privacy, safety and the right to education.

Teaching and training on good behaviour

Learners, teachers and parents should be taught about and trained on positive behaviour. As indicated above, Section 7(2) of the Constitution states that the State has a responsibility to respect, protect, promote and fulfil the human rights. Some of these duties can be fulfilled through teaching and training. Teaching of learners and training of teachers and parents should also include the values and human rights that are provided by the Constitution. Section 1(a) of the Constitution states that the positive discipline should be based on the fundamental values such as 'human dignity, equality and freedoms'. Human rights that are relevant to positive discipline have been discussed above. Section 8 and Section 9 of the *Schools Act* describe the role of the State which includes regulating and guiding the process of learner discipline. This is done by providing a law that promotes positive discipline such as items 1.4 and 1.6 of the Guidelines for the Consideration of Governing Bodies in Adopting a Code of Conduct for Learners (1998).

Sibanda and Mpofu (2017:124) recommend that schools should raise funds to fund training programmes that develop teachers and parents on how to apply positive discipline. Teaching and training on good behaviour can be in the form of social skills programmes, meetings, guidance and motivational sessions. These strategies are discussed below.

Social skills programmes

Social skills programmes play a crucial role in teaching learners about and training them on good behaviour. Section 4(b) of the *National Education Policy Act* 27 of 1996 (hereinafter referred to as NEPA) (RSA 1996c) provides that the Minister of Basic Education should determine the national policy that will enable teachers to develop the moral behaviour of learners. Schools that have programmes on social skills have a good strategy of promoting positive discipline in their school environment. Bej (2016:86) states that schools that use programmes on social skills that deal with learner behaviour make learners feel safe, recognised and important in their schools. Bej (2016:87) further states that the involvement of parents and teachers and early introduction of programmes on social skills benefit learners when it comes to good behaviour, especially when class meeting sessions are honoured by parents, teachers and learners.

Childs et al. (2016:89) indicate that the School-Wide Positive Behaviour Interventions and Supports (SWPBIS) is one of the good programmes on social skills used by schools. SWPBIS is meant to teach and train learners as to how to socialise and behave properly with the intention of ensuring that they are successful both socially and academically (Childs et al. 2016:89). Scott, Hirn and Barber (2012:111) state that positive behavioural interventions and support programmes assist in identifying and intervening when there is a behavioural problem in a school. Oosthuizen (2019:156) argues that this approach can be adapted and applied in classrooms. Schools should not wait until there are behavioural problems but should implement programmes on social skills as a preventative strategy for bad behaviour.

Meetings about learner behaviour

Meetings between teachers, parents and the learner to discuss learner behaviour should not be taken for granted. This strategy should be discussed and adopted in parents' meetings so that it forms part of the code of conduct for learners once it has been adopted. Meetings between teachers, parents and learners are an important strategy in dealing with learner behaviour in schools (Oosthuizen 2019:148). Many schools experience a problem with parents or guardians who do not attend school meetings because of their employment commitments. Many parents do not attend the school meetings held during the day (Maluleke 2014:29). To address this challenge, schools should hold meetings about learner behaviour with parents after working hours.

Guidance on behaviour

Teachers can provide positive guidance to learners who do not have a severe behavioural problem. Positive guidance is one of the forms of positive discipline that should be used to create a positive school environment. Parents and teachers should work as a team in guiding learners. Parental guidance has been found to be one of the major factors that is lacking, which affects positive discipline practices in schools (Sibanda & Mpofu 2017:118).

Stevens (2018:8) states that learners should receive positive guidance from their teachers. Guidance should include teaching learners how to conduct themselves properly in various situations and not to rely too much on other people when they must make decisions that would make them successful in life (Stevens 2018).

Motivation and encouragement

Encouragement and motivation are strategies that bring learners hope. Learners who have hope about the future are easily motivated, and they are able to control their behaviour so that it does not disturb the future they hope to achieve. On the other hand, learners who have lost hope do not care about controlling their behaviour, and they easily disturb other learners because of jealousy. Motivation and encouragement should not occur for 1 day; they should be continuous processes and are essential for learners to become successful in life (Oosthuizen 2019:146). Learners do become demotivated or discouraged and end up behaving improperly. Good teachers do not get tired when learners misbehave but continue to motivate and encourage them.

Professional counselling and professional therapy

Many learners show behavioural disturbances in our schools. According to Potgieter-Groot, Visser and Lubbe-De Beer (2012:12–14), most teachers have had numerous learners with emotional and behavioural problems, such as being angry, aggressive, disruptive, challenging authority, attention-seeking, disorganised and emotionally reactive in their classrooms. Some of these emotional and behavioural disturbances that lead to learner misbehaviour in schools are not of the learners' own making: according to Flick (2011:20), they are caused by biological influences, psychosocial and environmental influences, and family- and genetic risk factors.

Moreover, many teachers are not trained on how to identify and deal with learners who have emotional and behavioural problems. Potgieter-Groot et al. (2012) state that:

> All teachers involved in this research expressed a need for training and support in dealing with learners experiencing emotional and behavioural barriers, because they had no previous training to deal with the situation. The majority of teachers felt incompetent to deal with the diverse needs of learners. Some teachers lacked knowledge and understanding of emotional and behavioural barriers to learning. (p. 15)

Learners with emotional and behavioural disturbances should be disciplined in a constructive way. Section 8(5)(b) of the *Schools Act* indicates that measures of support for learners who are undergoing a disciplinary process – such as providing counselling services to such learners – should be included in the code of conduct for learners. Depending on the nature and degree of misconduct, learners with behavioural problems should be referred to specialists, such as professional counsellors and professional therapists. Professional counselling is a process whereby a person (learner) is formally advised by a professional counsellor on how to solve his or her personal problems (Nkechi, Ewomaoghene & Egenti 2016:38). In this case, we are referring to formal advice on solving behavioural problems of a learner. Professional therapy is a problem-solving strategy that provides a remedy for a particular problem (Oxford Thesaurus of English 2009:881) – in this case, it is a strategy that provides a remedy for a particular behavioural problem of a learner. Severe bullying, substance abuse, severe class disruption and other similar behaviours are examples of behavioural problems that occur in class and in school which need professional therapy.

Section 3(4)(o) of NEPA provides that the Minister of Basic Education should determine the national policy for various programmes, including counselling and guidance programmes for schools (RSA 1996c). The DBE should ensure that enough professional counsellors and professional therapists are available and these professionals’ services should be offered free of charge in order to support teachers in the creation of a disciplined school environment. Learners with severe behavioural problems should be accommodated in schools that are designed to help such learners.

Professional counselling and therapy should be integrated into the disciplinary process. Disciplinary measures cannot be positive if they do not assist emotionally and/or behaviourally disturbed learners.

■ Modelling good behaviour

Role modelling influences the behavioural factors of learners, and adults should model good behaviour in the society. According to Sibanda and Mpofu (2017:119–120), people expect teachers, parents and members of the community to be role models showing learners appropriate behaviour. In most cases, the behaviour displayed by learners in schools has been modelled in one way or another by adults in homes, schools or communities. The Alternatives to Corporal Punishment (2000:18) document states that learners look up to teachers as their behavioural role models.

■ Seating arrangement and calling attention to behaviour

Seating arrangement should be used to prevent behavioural problems before they happen (Flick 2011:168). Seating charts can be used to arrange seating in order to minimise disturbing behaviour in the classroom (Padayachie 2013:40; Stevens 2018:11).

Some non-serious misconduct requires teachers to call attention to the behaviour of learners. In a study conducted by Stevens (2018), one of the teachers mentioned that she:

> [*U*]ses small correction such as standing near the learner or tapping the learners on his/her shoulder to call attention to the behaviour. This action does not disrupt the entire class and quickly and quietly corrects the small misbehaviour. (p. 15)

Merit and demerit, reward and privilege systems

Merit and demerit, reward and privilege systems can be used to motivate learners to behave in a positive way. This will only happen when these systems are used constructively. Bad behaviour in schools can be discouraged by deducting points, withdrawing awards and withdrawing privileges, whereas good behaviour can be encouraged by awarding points, giving rewards and giving privileges. In addition, to motivate learners to change their behaviour and to give them room for improvement, teachers should allow learners who have lost points, awards and privileges to retrieve them if their behaviour improves. A criterion for retrieving points, awards and privileges should be clear to learners.

The merit and demerit system

The merit and demerit system is a disciplinary strategy whereby points are either awarded for good behaviour or deducted for misbehaviour (Joubert 2015:150). Joubert adds that teachers consider such a system as the most successful strategy for creating a disciplined learning environment. Licea (2016: 100–101) found that values that are necessary for shaping the character of learners in a school can be promoted by using a merit and demerit system. Schools should allow the process of reviewing the system, and teachers should be allowed to make an input to the improvement of the merit and demerit system (Licea 2016:101, 102). Licea (2016:98, 102) argues that schools should also consider allowing learners to make an input on the development and implementation of the system to avoid having a dictated merit and demerit system. To ensure that this strategy becomes successful, the support of the school administrative staff is needed (Licea 2016:98). The merit and demerit system allows learners to reflect on their behaviour, and it encourages them to change their behaviour from inappropriate to appropriate (Licea 2016:88).

The reward system

McClurg and Morris (2014) conducted a study about 'shaping student behaviours through reward systems'. Their literature review indicated (McClurg & Morris 2014):

> [*T*]he association between reward systems and behaviour change is a complex one involving a number of factors. We attempted to put the best practices from research and theory into effect in the present study to develop and test a reward system that would be effective in shaping student behaviour and performance, but would also minimise the costs of administration and contribute to learning. (p. 92)

They (McClurg & Morris 2014:100) found that extrinsic rewards can be used to encourage positive discipline, but they do not go beyond grades or marks in shaping behaviour and motivating learning. This means that teachers should use grades or marks more than external motivation to shape behaviour and motivate learning. Teachers, learners and parents should know how the reward systems work (McClurg & Morris 2014).

The privilege system

Privileges, when used positively and effectively, encourage learners to behave correctly. The Alternatives to Corporal Punishment (2000:17) states that schools should introduce activities that are enjoyable to learners (DBE 2000). These activities should serve as privileges and only well-behaved learners should be allowed to enjoy them. Examples of privileges that well-behaved learners can enjoy may include sports or cultural activities, school trips, class representative, Representative Council of Learners and farewells (Joubert 2015:149; Oosthuizen 2019:163), to name but a few. The withdrawal of privileges is not an infringement on human rights. In the court case of *Western Cape Resident Association, Williams and another v Parow High School*, 2006, Judge Mitchel confirmed that privileges can be withdrawn from learners because they are not human rights. Schools should ensure that the process of withdrawing privileges from learners is done constructively. This may include promising learners that, if they change their behaviour, they might earn the privilege back. Another strategy may be that learners are told that they will earn privileges based on their behaviour.

Behaviour management contracts and reports

After their behaviour management meeting with learners, teachers can draw up a written contract where they make an agreement about how the learner promised to behave. Such an agreement should be done in a positive spirit that intends to help the learner to improve his or her behaviour. Joubert (2015:149) advises that this should not be about the suspension.

Based on the behaviour management contract, learners can be required to reflect on a daily or weekly basis about their behaviour. The Alternatives to Corporal Punishment (2000:18) document provides that the daily report entails a strategy allowing learners to give daily feedback on how their behaviour is improving. Weekly reports allow learners to report on a weekly basis.

Constructive time-out

Constructive time-out is a temporary removal of a learner from class to deal with the learner's behaviour in a positive way. Oosthuizen (2019:146) calls this strategy *positive time-out*. During the implementation of this strategy, learners must gain knowledge, skills, values and attitude that will change their behaviour.

Constructive time-out can be used if a learner continuously disturbs a teacher whilst teaching, violates other learners' human rights and is uncontrollable. The school should have a clear policy on constructive time-out so that it does not infringe on learners' rights to education, human dignity, privacy, safety, etc. According to Oosthuizen (2019:146), time-out gives both the teacher and the learner an opportunity to cool off and keep oneself under control. Learners should not be expelled from class and sit outside. They should be supervised to ensure their safety. In addition to what Oosthuizen (2019:146) said about the role of time-out, a learner should be taught about behaviour whilst he or she is outside the class. No learner should be left unattended. Schools should have clear procedures for where they will keep learners during time-out and who will be attending to such learners.

Constructive detention and constructive extra work

Constructive detention is not just the process of separating misbehaving learners from other learners during teaching time, during short break or after classes as happens in many schools; it entails supervised isolation whereby a learner learns new knowledge, skills, values and attitudes. It should be constructive and benefit the learner. Therefore, relevant activities should be designed to benefit isolated learners.

Constructive extra work means giving learners additional work that will benefit them. This can be written or non-written extra work. As this can cause a learner to develop a negative attitude towards a particular subject (Joubert 2015:149), it should be designed to benefit the learner, and the learner must see the benefit. The work should be based on any of the subjects that the learner is doing.

Constructive community work

Community work must be educative, safe, healthy, non-abusive and should not be done during teaching time. Joubert (2015:149) states that 'community work must be supervised and should not be done during class time'.

The negative influence of *Ubuntu* on learner discipline

Whilst the above-mentioned strategies show how *Ubuntu* can play a positive role in learner discipline, it should also be noted that *Ubuntu* can have a negative influence on learner discipline. For instance, some learners understand '*Ubuntu*' as forgiveness (Bonn 2007:873). In this case, learners may think that they will always be forgiven and not punished when they commit a misconduct all in the name of *Ubuntu*. This means that some learners can take advantage of and misuse the principles of *Ubuntu*. On the other hand, some of the teachers can be too lenient when implementing the disciplinary measures and not take necessary steps as required by education law and policies (Mollo 2015:192–193). Teachers can sometimes sympathise too much with learners who have been involved in misconduct, ending up not applying law and policies as required. Learners should be taught that the use of *Ubuntu* during the disciplinary process will not work against applicable law and policies. They should know that the disciplinary measures will be implemented according to law and policies following the principles of *Ubuntu*. The same applies to teachers, and they should implement law and policies following *Ubuntu* principles. Positive discipline includes the management of both positive and negative influences of *Ubuntu* principles during the disciplinary process.

■ Research design

The design is vested in a transdisciplinary assumption. The motivation behind such an approach is to obtain rich, in-depth data from both a social science qualitative perspective and a legal perspective.

From a legal perspective, the historical legal method (Venter et al. 1990:161) based on a precedent point of departure was utilised.

The qualitative data were analysed by means of content analysis in order to systematically examine the content and identify themes regarding the phenomenon of positive discipline and its application to *Ubuntu* (Gall, Gall & Borg 2007:287; Leedy & Ormrod 2014:150).

■ Research methodology

Data collection methods: Data collection is regarded as a detailed and systematic examination of reliable recorded material to identify patterns and themes (Leedy & Ormrod 2014:150). In this regard, data were collected by means of document analyses in order to obtain a full picture of phenomena positive discipline and *Ubuntu*.

Data analysis: Information obtained from the qualitative document analyses of court case reports, legislation and selected literature was utilised to identify and scrutinise the characteristics of the phenomena under examination.

Ethical clearance: The essential data were collected from public documents such as court reports. No (human) participants were involved in this research; therefore, there was no need to apply for ethical clearance.

Relevance of applicable case law

In this section, we apply a document analysis of applicable court cases in order to trace the effect of *Ubuntu* on South African court cases.

Good neighbourliness and shared concerns

Ubuntu emphasises our mutual reciprocity of the individual towards the sound fibre of society. In this regard, in *Port Elizabeth Municipality v Various Occupiers*, Justice Sachs argued in terms of the Constitution and the *Prevention of Illegal Eviction from and Unlawful Occupation of Land Act* 19 of 1998 (PIE):

> Our Constitution requires a court to weave the elements of humanity and compassion within the fabric of the formal structures of the law and to promote a caring society on good neighbourliness and shared concern.
>
> Thus, PIE expressly requires the court to infuse elements of grace and compassion into the formal structures of the law. It is called upon to balance competing interests in a principled way and promote the constitutional vision of a caring society based on good neighbourliness and shared concern. The Constitution and PIE confirm that we are not islands unto ourselves. (para. 37)

Instituting responsibility

Bhe and others v Magistrate, Khayelitsha and others, referring to *Ubuntu*, dealt with some of the valuable features of customary law for the prevention and resolution of disputes. Amongst others, it emphasised the bearing of reciprocal responsibility on sound collective behaviour and attitude within the precincts of the particular society.

Good neighbourliness referred to above suggests that *Ubuntu* does not stop with me – it is obviously not only about me enjoying my freedoms and my fundamentals rights in a good neighbourly environment; from my side, I owe it to my neighbourly community to be a 'good' neighbour to my society.

One of the tenets of being a 'good' member of society is to abide by the normative system defining and regulating proper human conduct of societal behaviour.

Restorative justice

Diedrich (2011:7) describes restorative justice as an approach seeking justice by 'promoting cohesion by inducing reconciliation between the offender, the victim and the community at large', involving all the parties in the process.

Justice Sachs, referring to the philosophy of *Ubuntu*, favoured an approach of restorative justice instead of a retributive inclination of punishment. The main predisposition of restorative justice is rehabilitation, not only for the wrongdoer but also for the restoration of the damage caused to the victim and/or society as a whole (Cornell & Muvangua 2012:15). An application to this notion is, for example, found in the case of *S v Joyce Maluleke* where Judge Betelsmann, upon request of the deceased's mother, amongst others, ordered the accused to apologise to her (the mother) for the wrong that he has done.

Summarised in the words of Cornell and Muvangua (2012), Justice Mokgoro explained the ideal of the restoration of wrongdoers as well as the rift it causes in society and its victims, as follows:

> In essence, Mokgoro maintains in emphasising restorative rather than retributive justice in the spirit of *Ubuntu*, we should keep in mind of knitting together shattered relationships in the community and that the courts should be proactive in encouraging 'respect for the basic norms of human and social interdependence'. (p. 373)

Justice Madala, concurring with the judgement in *S v Makwanyane*, argued that *Ubuntu* favours punishment, not to be retributive by nature but to be rooted in restorative justice, seeking to rehabilitate the wrongdoer.

Similarly, in the case of *S v Shilubane,* Justice Bosielo also emphasised the importance of the *Ubuntu* embeddedness of restorative justice:

> Inasmuch as it is critical for the maintenance of law and order that criminals be punished for their crimes, it is important that presiding officers impose sentences that are humane and balanced. There is abundant empirical evidence that retributive justice has failed to stem the ever-increasing wave of crime. (para. 5)

Reparation for damage

The case of *Dikoko v Mokhatla* dealt with reparation after defamation. In her ruling, Justice Mokgoro emphasised the values of *Ubuntu* when she said that, in addition to the monetary compensation which was awarded to the plaintiff, it is vital for the respectful relationship to be re-established between the contesting parties:

> The primary purpose of a compensatory measure, after all, is to restore the dignity of a plaintiff who has suffered the damage and not to punish a defendant. A remedy based on the idea of *Ubuntu* or *botho* could go much further in restoring human dignity than an imposed monetary award in which the size of the victory is measured by the quantum ordered and the parties are further estranged rather than brought together by the legal process. It could indeed give better appreciation and sensitise a defendant as to the hurtful impact of his or her unlawful actions, similar to the emerging idea of restorative justice in our sentencing laws. (para. 68)

Consequently, because of this point of view, the Constitutional Court ordered the so-called *amande honourable* (apology) in addition to a monetary compensation for defamation that was ordered.

Procedural fairness

In *Koyabe and others v Minister for Home Affairs and Others*, the general obligation to treat others with respect and dignity and to avoid confrontation was associated with *Ubuntu.* In this case, which was all about procedural fairness, Justice Mokgoro contended:

> Further, in our constitutional democracy, officials are enjoined to ensure that the public administration is governed by the values enshrined in our Constitution. Providing people whose rights have been adversely affected by administrative decisions with reasons, will often be important in providing fairness, accountability and transparency. In the context of a contemporary democratic public service like ours, where the principles of *batho pele*, (meaning people first in Sesotho) coupled with the values of *Ubuntu*, enjoin the public service to treat people with respect and dignity and avoid undue confrontation, the Constitution indeed entitles the applicants to reasons for the decision declaring them illegal foreigners. It is excessively over-formalistic and contrary to the spirit of the Constitution for the respondents to contend that under Section 8(1) they were not obliged to provide the applicants with reasons. (para. 62)

Reconciliation rather than retribution

Basically, the criminal law system focuses on retribution and not so much on reconciliation (Diedrich 2011:7). In the court case *M v S,* it was argued that the criminal law's focus on retribution contravenes our common law system with its emphasis on reconciliation and cohesion. This kind of social harmony and reconciliation of a society finds itself in the spirit of *Ubuntu* which was best illustrated in the activities of the South African Truth and Reconciliation Commission (TRC).

The TRC of South Africa operated like a court after it was formed by the government of South Africa in 1995 (Tutu 2019:n.p.). Its main intention was to bring a reconciliation amongst the people of South Africa after a violation of human rights that took place during the apartheid era (Encyclopaedia Britannica).

The model for the application of positive discipline in schools

One of the pillars of any society is the existence of orderly standards regulating harmonious and reciprocal conduct. As far as education is concerned, order must prevail for any kind of teaching and learning to operate at a functionally optimal level. In fact, no education is functionally possible in a disruptive and disorderly milieu. The current trend in the application of order in the teaching and learning environment shows a swing away from the punitive and retributive towards various forms of positive discipline.

Another pillar conducive to the enhancement of the sound teaching and learning is core values flowing from the community. Within the (South) African context, the values that underpin *Ubuntu* clearly emphasise the importance of humaneness of humankind and its dignity. In addition, *Ubuntu* also stands for a healthy fibre of societal frameworks in which humankind find themselves. It is on this premise of the *Ubuntu* dictum that African customary law functions when it proclaims 'I am you because you are' and '[y]ou are because I am' (Omale 2016:132). In addition, *Ubuntu* sets a suitable platform for the application of the current international swing towards the application of positive rather than punitive and retributive discipline in schools.

Yet another pillar for the enhancement of sound teaching and learning is the legal system of a country such as South Africa. In South Africa, the legal system is steered mainly by the provisions of its Constitution but also by parliamentary legislation, common law, as well as customary and case law.

Ultimately, it is a kind of a balancing act between the interests of the community and the individual. On the one hand, humankind exist within the confines of a community and, on the other hand, society exists because the individual exists. In other words, both entities relate to the other, being dependent on the other, based on a social contract between individual and the community.

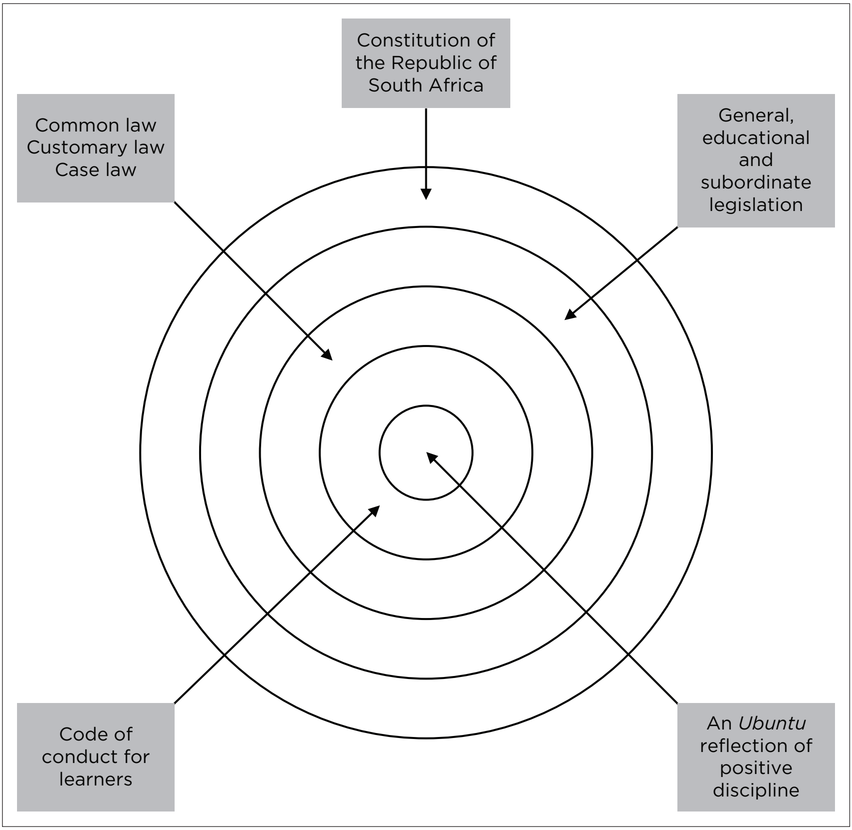
Constitution of the Republic of South Africa
Common law
Customary law
Case law
General, educational and subordinate legislation
Code of conduct for learners
An *Ubuntu* reflection of positive discipline

FIGURE 10.1: An education law model for positive discipline in relation to *Ubuntu*.

This reciprocally jointed approach is portrayed in the model shown in Figure 10.1.

■ Conclusion

The chapter demonstrates that positive discipline is an appropriate way of creating a positive teaching and learning environment in our schools. Positive discipline involves the use of various forms of positive disciplinary strategies that are based on various sources of education law and the theory of *Ubuntu*. The proper implementation of education law and *Ubuntu* plays an important role in ensuring that learners' human rights are respected, protected, promoted and fulfilled by, and within, organs of state, such as schools. The recommended model for the implementation of positive discipline should be applied not only by teachers but also by different stakeholders in education in order to move away from the punitive and retributive way of disciplining learners.

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This book addresses a perennial challenge to the success of the South African education system, namely discipline, and steers the interrogation of discipline in a new direction to reflect on the benefits of recent research. The scholarly contribution lies in its in-depth exploration of the relevance of research findings to South African schools and to the twenty-first century socio-political environment. For the first time, scholarly interrogation of the issue of learner discipline in South African schools draws on indigenous knowledge systems. Its post-colonial and decolonial perspectives offer an ethical and moral compass for behaviour that could contribute to the wellbeing of South African society (and other societies similarly afflicted by anti-social behaviour). The book offers a range of perspectives on the debates on discipline and associated issues, and should stimulate future discussions on discipline and indiscipline at a time when South Africa and many other societies engage with the effects of social and political transformation. The contributors include philosophers, moralists, comparativists, education law specialists, curriculum specialists, specialists in education and culture, advocates of *ubuntu*, and people using meta-syntheses of approaches and practices and religious practices such as a Christian ethical or moral approach to parental and school discipline. They draw on their insights into postcolonialism, the impact of indigenous knowledge, theories of agency, dysfunctionality and school underperformance.

◆

Discipline in Education: Some less frequently explored issues, edited by Prof. Johan Botha of NWU, deals with a perennial problem in education all over the world. Earlier educators followed a zero tolerance policy to discipline and learners were often subjected to corporal punishment, suspension and expulsion. When human rights appeared on the horizon, corporal punishment was banished, and suspension and expulsion were still allowed but were more strictly regulated. Learner indiscipline and teacher frustration increased to the extent that some schools became totally ungovernable and dysfunctional, and many teachers left the profession or intended to leave it. In this book, the authors set out to explore often-overlooked aspects of discipline with the hope of unearthing new knowledge that would improve learner and teacher discipline, as well as the climates of schools and the performance of learners. The authors are all well acquainted with the topics they explore like postcolonialism, religion and education, indigenous knowledge, social factors influencing discipline and how the law makes positive and restorative discipline possible. Some of the authors are internationally renowned, some are local leaders in their fields, and some beginning to build excellent careers supported by more experienced academics. The book has a positive message: the discipline situation is not hopeless or desperate, and looking for solutions in unusual places may help us restore positive discipline in our schools.

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