ENTREPRENEURIAL DEVELOPMENT THROUGH NON-FORMAL ADULT EDUCATION AND SKILLS TRAINING IN A RURAL COMMUNITY

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Thesis presented in partial fulfillment of the requirements for the degree of Masters of Consumer Science

at the

University of Stellenbosch

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April 2003

"DECLARATION

I, the undersigned, hereby declare that the work contained in this thesis is my own original work and that I have not previously in its entirety or in part submitted it an any university for a degree.

SUMMARY

In recent years unemployment figures in South Africa have reached alarming proportions. Many people do not have any form of income, and many others rely on irregular incomes from seasonal work. Education of adults has been highlighted as a possibility for teaching people various skills, which they could apply to generate an income for themselves. This research was conducted by following a participatory action research method to determine whether a nonformal adult education programme would assist individuals in generating an income.

The literature review to support the research conducted included a discussion on poverty, rural areas and their development, and the relevance of entrepreneurial development for these areas. From here, the focus of the literature review moved to that of adult education as applied in training programmes. Participatory Action Research (PAR) and its role in a nonformal adult education programme is discussed, followed by a discussion of empowerment. The monitoring and evaluation of these programmes are also described.

The Development and Advancement of Rural Entrepreneurship (DARE) is a programme that was launched in 2000 by the Department of Consumer Science: Foods, Clothing, Housing at the University of Stellenbosch. The main focus of this programme is the assistance given to rural communities to assist them in addressing the problem of unemployment and poverty, by providing support and training to potential local entrepreneurs.

The rural town of Montagu was identified to conduct a nonformal adult education programme, focusing on skills training and entrepreneurial development of interested individuals in the community. The research period lasted 14 months. The programme itself consisted of different projects that concentrated on skills training suitable for income generation. People from the community were invited to attend the programme, making all participation voluntary. A PAR approach to present training skills was followed. Each PAR cycle consisted of four stages, namely planning, action, observation, reflection, as well as the revised plan which forms the first phase of the next plan. This approach ensures maximum involvement of participants. Empowerment levels of participants were measured using a standardised questionnaire with a pre- and post- test design. One of the PAR cycles included a five-day business course. Different aspects of entrepreneurship were addressed during the programme and eventually all the skills were combined and implemented to assist in the generation of income.

Data of the empowerment levels of participants, and general information on the participants and their evaluation of the programme are documented as case studies. This data was also used to evaluate the success of the programme.

The analysis of the data clearly shows that there was a need for skills development and entrepreneurial development in this rural area. Participants were eager to take part in the programme and to apply their skills in the market place where they displayed the skills they have acquired. Those participants who completed the programme all demonstrated an increase in their empowerment levels, the most significant increase on micro level.

The research results indicated that participants were able to apply the knowledge and skills gained during the programme. However, four months after the completion of the programme none of them were involved in income-generation ventures. Despite the fact that the need for training existed in this rural area, sustainability was problematic once the facilitator withdrew. It is therefore recommended that novice entrepreneurs should have long-term guidance and emotional support in order to reach independence eventually.

OPSOMMING

Die werkloosheid syfer in Suid-Afrika het die afgelope paar jaar onrusbarend toegeneem. 'n Groot aantal mense het geen vorm van inkomste nie, en baie maak staat op die inkomste wat hulle uit seisoenwerk genereer. Opleiding van volwassenes is aangedui as 'n wyse waarop mense 'n verskeidenheid vaardighede kan aanleer wat hulle dan kan toepas om sodoende vir hulself 'n inkomste te genereer. Hierdie navorsing is onderneem om te bepaal of 'n nieformele opleidingsprogram waar 'n deelnemende aksienavorsingsmetode (DAN) gevolg is, individue sal kan help om 'n inkomste te genereer.

Die literatuuroorsig wat die navorsing onderskryf, sluit 'n bespreking in van armoede, landelike areas en die ontwikkeling daarvan asook van die relevansie van entrepreneuriese ontwikkeling in hierdie areas. Die fokus van die literatuur verskuif dan na volwasse onderwys, soos toegepas in opleidings programme. Daarna word deelnemende aksienavorsing (DAN) en die rol daarvan in programme in nieformele onderwys vir volwassenes bespreek. Dit word gevolg deur 'n bespreking van bemagtiging. Laastens word monitering en evaluering van programme bespreek.

Die *Development and Advancement of Rural Enterprises (*DARE) Program is deur die Universiteit van Stellenbosch, Departement Verbruikerswetenskap: Voedsel, Kleding, Behuising in 2000 geloods. Die fokus van die program is om bystand aan landelike gemeenskappe ten opsigte van die hantering van werkloosheid en armoede aan te spreek.

Die landelike dorp Montagu, is geïdentifiseer as 'n area om 'n nieformele onderwysprogram vir volwassenes wat fokus op vaardigheidsopleiding en entrepreneuriese ontwikkeling van belangstellende individue in die gemeenskap, aan te bied. Mense van die gemeenskap is uitgenooi om vrywillig aan die program deel te neem. Die navorsingsperiode het oor 14 maande gestrek. Die program self het bestaan uit verskillende projekte wat op opleidingsvaardighede geskik om 'n inkomste te genereer, fokus. 'n Deelnemende aksienavorsingsmetode is gevolg om opleidingsvaardighede aan te bied. Elke DAN-siklus het uit vier fases bestaan, naamlik beplanning, aksie, observasie en besinning. 'n Hersieningsplan het deel uitgemaak van die eerste fase van die volgende siklus. Hierdie benadering het maksimum betrokkenheid deur deelnemers verseker. Tydens een van die DAN siklusse, is deelnemers se bemagtingingsvlakke gemeet deur gebruik te maak van 'n gestandaardiseerde vraelys met 'n voor- en ná-toets ontwerp. Een van die DAN-siklusse het uit 'n vyf-dag sakekursus bestaan. Verskillende aspekte van entrepreneurskap is tydens die program aangespreek en ten slotte is alle vaardighede saamgevoeg en geïmplementeer om die generering van inkomste aan te moedig.

Gevallestudies is gebruik om deelnemers se bemagtigingsvlakke, algemene inligting oor die deelnemers en die deelnemers se evaluering van die program aan te teken. Hierdie data is ook gebruik om die sukses van die program te evalueer.

Die data analise wys uitdruklik dat daar 'n behoefte was aan die ontwikkeling van vaardighede en entrepreneuriese ontwikkeling in hierdie landelike gebied. Deelnemers was gretig om aan die program deel te neem en om vaardighede wat aangeleer is, toe te pas op die ope mark. Die deelnemers wat die program voltooi het, het almal 'n verbetering ten opsigte van hulle vlakke van bemagtiging getoon, met die grootste verbetering op die mikrovlak.

Die navorsingsresultate bevestig dat die deelnemers hulle vaardighede en kennis wat in die program verwerf is, kon toepas. Nogtans was geeneen van die deelnemers wat die program voltooi het, vier maande ná die afloop van die program besig om 'n inkomste te genereer nie. Al was daar 'n behoefte aan opleiding in hierdie landelike area geidentifiseer, was daar, nadat die fasiliteerder onttrek het, geen volhoubaarheid van die program nie. Daar word dus aanbeveel dat opkomende entrepreneurs langtermynondersteuning sal geniet wat uiteindelik tot hul onafhanklikheid sal lei.

ACKNOWLEDGEMENTS

To my parents and brother, who supported me throughout the past two years and provided me with their never-ending guidance and encouragement

To my family, for their support and understanding

To my study leaders, who guided me through the process of completing my dissertation

To all the people I befriended in the town of Montagu, for their warmth and hospitality

To all those people who participated in the programme, without you, this would not have been possible

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STATEMENT OF PROBLEM

1.1   Introduction and motivation

Poverty and unemployment are grave realities in South Africa, especially in rural towns. This is unfortunate and it is difficult to separate the two concepts, as they influence each other. For this reason it is believed that training is one of the main aspects to decrease poverty and unemployment (Coetzee, 1992:295).

People should be equipped with knowledge and skills that are relevant to economic performances, and should also be assisted in an effort to develop their potential. Training in itself fulfils a specific role, in that it helps to prevent people from lapsing back into poverty and unemployment, thus helping them to lift themselves out of the vicious circle created through years of poverty leading to unemployment as a result of a lack of skills and poor schooling (Coetzee, 1992:300).

A goal in life to strive for is that of empowerment of the individual, with the act of developing, building and increasing power of individuals through their sharing of ideas and working together during skills-training. This entails the concept of empowerment. People should therefore be motivated to take a action in determining their own destiny. They should be prepared to work and to take responsibility for what they want to achieve. People are hence given the opportunity to take part in decision-making processes. One main focus of empowerment is to provide training so that individuals become less dependent on others for help, and able to help themselves to lead a better life (Suojanen, 1998:86).

It becomes clear that training is a priority in areas where poverty is rife amongst especially rural communities. Montagu, situated in the Western Cape, is a prime example of a rural town which has many unemployed people. The main reason for this is seasonal work provided by farmers in the area where employment is provided for part of the year. Once the harvesting season is over, people have to find ways to make ends meet without a secure income to help them along the way. On 1 November 1995 the population of Montagu was 23 597 (Central Statistical Services, 1996), with local Montagu sources from the Information centre estimating the passing of 140 000 tourists annually. With such a large number of tourists visiting the town, there is room for the tourist industry to expand, creating some form of income-generation for the local residents of Montagu, focusing on those living in poverty.

A venue to assist with skills-training and development programmes is available in Montagu. The *Montagu Ashton Gemeenskapsentrum* (MAG) has training halls and equipment. Different training programmes have been presented at MAG, with the focus on the "Training of Trainers" and that of

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business skills. Incorporated with MAG is Xuaka, an accommodation centre. Xuaka provides basic accommodation in a hostel type set-up, which is open to members of the public.

An important concept in any programme is that the success of participants should not be limited to the completion of a programme. It should rather seek to bring about change, which will continue once the programme has been completed (Hayes, 1967:16).

With skills-training programmes in the rural area of Montagu, the development of underdeveloped potential might take place. A variety of skills-training programmes could be taught through a non-formal adult education programme. The training might help the unemployed to develop the ability to generate an income for themselves, by providing products or services to tourists or the local community.

Against this background, the following research question was formulated:

> *Is it possible to convert underdeveloped skills and potentials of an individual into profitable skills, facilitating empowerment through non-formal adult education programmes?*

From the research question the following goal was formulated, which is supported by six objectives.

1. 2   Goal

The goal of the study was to develop and implement skills-training projects through a non-formal **adult education** programme, to assist them in **generating income** in the rural town of Montagu.

1.3   Objectives

The objectives below were identified in relation to the goal:

1.3.1   to do a context analysis of a demarcated rural area;

1.3.2   to determine the interests of the community regarding skills-training projects, and accordingly to identify types of training projects needed;

1.3.3   to present skills-training projects through a non-formal adult education programme using participatory action research (PAR);

1.3.4   to evaluate the non-formal adult education programme by:

1.3.4.1 *measuring the empowerment of the participants utilising a pre- and post-test design, and*

1.3.4.2 *developing a questionnaire to evaluate the success of the projects presented through a non-formal adult education programme.*

1.3.5   to document selected outcomes of the programme by means of case studies.

1.4   Research procedure
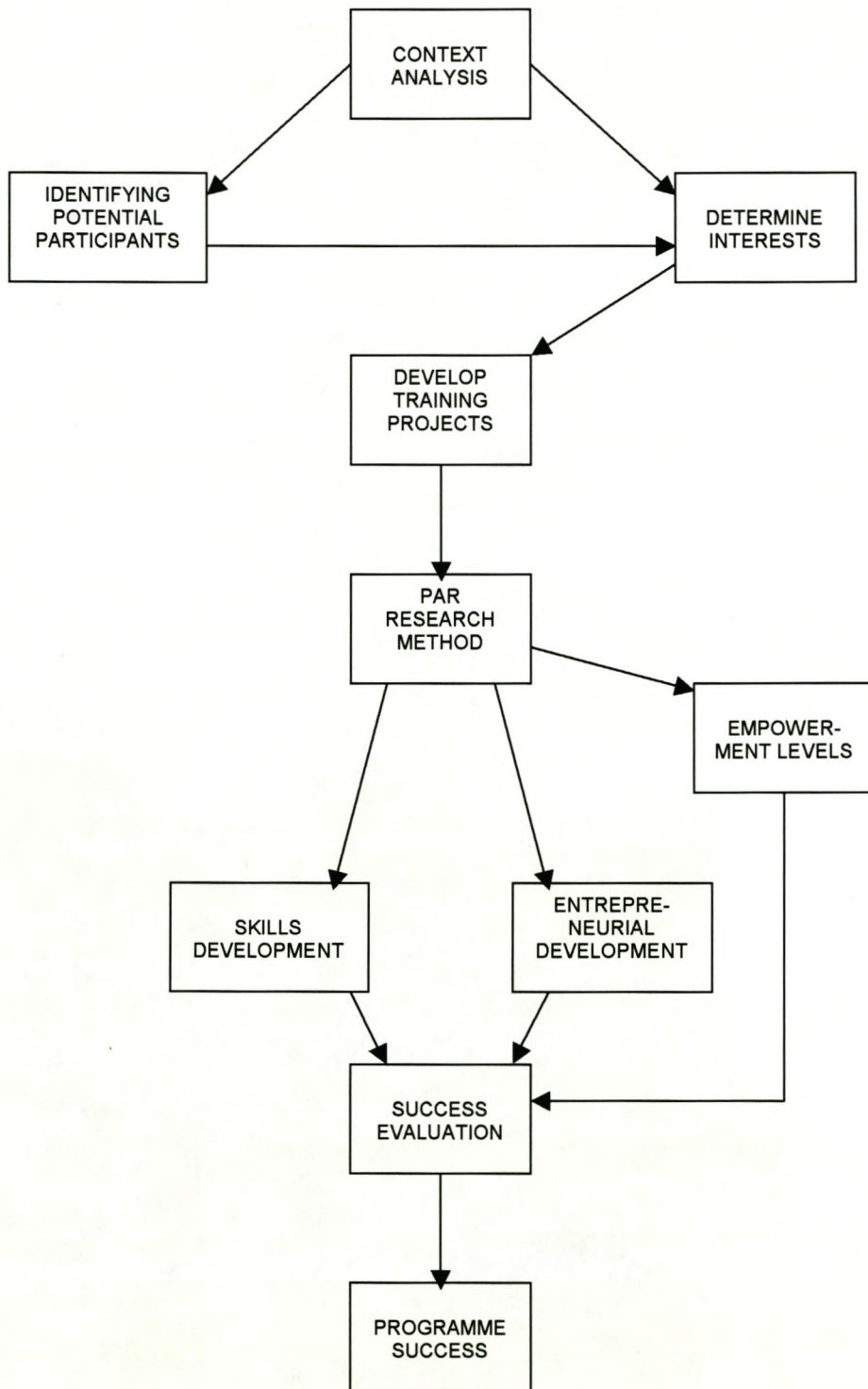
Figure 1: Research procedure

1.5   Description of terms

1.5.1   Empowerment

The word *empower* means to enable, permit or allow. It can be self-initiated or initiated by others. It is an act of building, increasing power and development through sharing, co-operation and working together (Turrki, 1998:85).

With the Montagu programme, one of the main purposes was to give the participants the power over their own lives by working together and creating a supportive framework for each other by means of training and development.

1.5.2   Poverty

Individuals, families and groups in the population can be said to be in poverty, when they lack the resources to obtain the types of diet, participate in activities and have the living conditions and amenities which are customary ... in societies to which they belong (Alcock, 1997:67).

Poverty is a major problem in Montagu as a result of seasonal farm work and a general lack of job opportunities, making skills-training and development an important factor to consider in combating poverty.

1.5.3   Non-formal adult education

Non-formal education takes place outside the traditional framework and system. However, ... non-formal education is organized and has pre-determined objectives. It also has certain sequential learning structures which are not necessarily graded (Fox, 1988:1).

Another characteristic of non-formal adult education is its flexibility concerning duration and time.

1.5.4   Participatory action research (PAR)

This is defined by Suojanen (1998: 81) as ...*a form of collective self – reflective enquiry undertaken by participants in social situations in order to improve the rationality and justice of their own social and educational practices as well as their understanding of these practices and the situations in which these practices are carried out.*

PAR will be used throughout this research, as it is flexible and provides a good method of measuring and evaluating progress of the project at hand.

1.5.5 Evaluation

The basic meaning of *evaluation*, according to Dale (1998:11) is to *assess the value*. Evaluation aids us in understanding the consequences of certain actions, and in learning from one's experiences in order to improve performance. Evaluation can be divided into two categories, namely formative evaluation and summative evaluation.

1.5.5.1 Formative evaluation

This is the assessment of different components and their functioning in a programme during different stages in the programme. The components include aspects of design, preparation and implementation together with learning outcomes. To attain final objectives, continuous monitoring must occur, so that problems can be sorted out as soon as they are recognised and not only once the programme has been completed (Dale, 1998:30-31; Murphy, 1989:457). Formative evaluation will be used under the concept of monitoring, which takes place as a routine collection and analysis and reporting of information about the performance of the work that has taken place (Dale, 1998:28).

1.5 5.2 Summative evaluation

Summative evaluation is done once the programme has been completed, to judge the value of a programme and its design and management, and whether programme objectives have been met. The basic aim of this type of evaluation is to provide guidelines that can be implemented in similar or other development programmes, and it is a determining factor in deciding whether a programme should be allowed to continue, or whether it should be terminated (Dale, 1998:32; Scriven, quoted by Murphy, 1989:457).

1.6 Research report sequence

Chapter one gives an introduction and the motivation for the research conducted. The goal and several objectives are identified, followed by a research procedure. A description of terms used throughout the study is provided.

Chapter two constitutes a review of the relevant literature to provide a theoretical framework for the study. Different concepts are explained and discussed from adult education to *poverty,* and more specific in *rural areas*, as well as the importance of *entrepreneurial development*. PAR and its application in non-formal adult education programmes are examined, followed by a discussion on

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empowerment of individuals. Lastly, attention is given to *monitoring and evaluation* methods suited to this type of study.

Chapter three provides a description of the methodology and research procedure followed in the study. The chapter includes a context analysis (objective 1.3.1) of the demarcated rural area. This is followed by a description of the procedure followed to determine the interests of community members (objective 1.3.2). The PAR cycles are explained (objective 1.3.3). The evaluation of the non-formal adult education programme is explained (objective 1.3.4) according to the measuring of empowerment of participants (objective 1.3.4.1), and by measuring the success of the programme (objective 1.3.4.2). All the data gathered from the evaluation of the programme is presented in the form of case studies (objective 1.3.5).

The results are presented in chapter four. This includes data on the context analysis of the demarcated rural area (objective 1.3.1) and the interests of the people (objective 1.3.2). The 15 PAR cycles that were conducted (objective 1.3.3) as well as the evaluation of the non-formal adult education programme (objective 1.3.4) by measuring the empowerment of the participants (objective 1.3.4.1), and the success of the programme (objective 1.3.4.2). The evaluation of the programme is documented in four case studies (objective 1.3.5).

A discussion of the results and the researcher's interpretation of this data is presented in Chapter five.

In Chapter six recommendations are made concerning to the study, and conclusions are presented.

CHAPTER 2

LITERATURE REVIEW

The literature review regarding this study focuses on several aspects. A large majority of the South African population lives in poverty (2.1), which is the first issue to be dealt with. Many of the poor live in rural areas where the second aspect, namely rural development (see paragraph 2.2), should be promoted. One way of overcoming poverty is through entrepreneurial development (as discussed in paragraph 2.3), which is the third aspect. The fourth aspect, namely adult education (see paragraph 2.4 for a discussion) is needed to educate and train people for this development. Action research (as explicated in paragraph 2.5) which is the fifth aspect, can be used as a research method to initiate and develop a programme. People taking part in a programme all strive to become better in what they can do or know, which is why it is important to study the notion of empowerment (as set out in paragraph 2.6) the sixth aspect. The seventh and last aspect that was reviewed, is that of monitoring and evaluation (set out in paragraph 2.7). For any programme to be successful, it is important to do systematic checks on the programme to see if it is progressing towards the intended goal.

2.1   Poverty

Rural areas are known to have high rates of poverty because of a lack of employment opportunity, and the isolation of these areas from the larger urban areas where there are normally more job opportunities. In South Africa, most of the poor reside in the rural areas, with these areas containing 72% of the poor. Wealth distribution in South Africa is among the most unequal in the world, which has a negative effect on the social and political situation in the country, especially when considered in the light of the country's developmental path (Poverty and inequality in South Africa, 1998).

2.1.1   Defining *poverty*

In the report of the International Fund for Agricultural Development (IFAD) (2002:87) a description of poverty is given, namely that it is a ... *normal state of local incapacity to cope with threats, including the new challenges that come with economic and social transformation...* Webster (1991:16) mentions that poverty is a relative term, making it difficult to give the concept an exact definition. The only way, he suggests, to define it, is to compare the circumstances of one group of people, or a whole community with one another. A problem with this definition could be the wide range of *adequate* living standards held by some, and not by others. Alcock (1997:67) gives a more precise definition of poverty, namely that it can be defined as the lack of resources to obtain

the types of diet, lack of participation in activities, together with living conditions and amenities which are not customary in the societies to which they belong.

After considering the different views on – and definitions of - poverty it is clear that there is a lack of agreement over what constitutes poverty, and what not. Although this might be true, there are different types of poverty, according to which a more definite classification of those living in poverty could be described.

2.1.2   Measuring poverty

Poverty can be measured in a variety of ways, but, because of its nature, it is a sensitive and complex issue. The first way of measuring it is by utilising the Human Development Index (HDI), which measures the lifespan of an individual, his/her life expectancy at birth, educational levels and living standards. The second measurement is one based on income levels, applying the Gini coefficient which ranges from 0 (*absolute equality*) to 1 (*absolute inequality*). During the past few years South Africa's Gini coefficient has been 0,58, which is currently the second highest in the world (Brazil has the highest figure). Household incomes are also used to examine the income inequality. In South Africa, the poorest 40% of households receive only 11% of all income of the country (Poverty and inequality in South Africa, 1998).

Studying poverty by making use of these methods of measuring are known as *quantitative studies*. These methods are the most predominant measures, using statistical techniques. People who are defined as poor, are counted, and the extent of their inequality is measured. Quantitative studies will give a limited picture of the extent of poverty as social factors are not taken into consideration. Quantitative measures of poverty are measured in real life terms. Quantitative studies presents an objective and scientific picture. All government statistics are quantitative, the public generally has free access to it, and it has official status (Alcock, 1997:115-120).

Although poverty can be measured statistically, poverty-stricken households experience it first hand, which is not portrayed in any statistics. Poverty often comprises doing hazardous work for a low wage, powerlessness to bring about change, high stress levels, and continuous ill health. Constant emotional stress together with high rates of violence also impact the lives of the poor. A defining characteristic of being poor is the absence of power, especially among women (Poverty and inequality in South Africa, 1998).

These indirect measures are known as *qualitative indicators*. These measures are continually developing. A simple example is that of television or radio (documentary or fiction) which draws huge audiences. Actuality programmes bring these people to the fore and encourage them to speak for themselves about personal experiences. Qualitative measures present the impact of

poverty, and gives more descriptive titles. These measures are however more readily dismissed by some critical academics and unsympathetic politicians, as it is not based on statistics (Alcock, 1997:127-129).

After considering the different views on and definitions of poverty, it is clear that there is no agreement over what constitutes poverty. Although this is true, there are different manifestations of poverty that exist and according to which a more definite classification of those living in poverty can be described.

2.1.3   Types of poverty

Poverty is not static. People move in and out of poverty, depending on their circumstances (financial, social and natural). Uncontrollable events may shift vulnerable people into a state of poverty, which could be short-term or which could become long-term. The vulnerability is caused by people's inability to develop an appropriate coping strategy with which to manage a crisis they are faced with (Poverty and inequality in South Africa, 1998).

Poverty can be classified according to the disadvantage level experienced, namely *absolute* and *relative* (Alcock, 1997:68-69; De Beer, 1997:2; Delamont; 1992; Webster, 1991:16).

Absolute: This is an objective measurement, based on the notion of subsistence (the minimum needed to sustain life). This is the stage where people are barely existing, with a cumulative effect of malnutrition and starvation. Therefore, if someone does not have enough to live on, that person will starve and perish as a result of the elements (De Beer, 1997:3). This concept therefore refers to the actual physical needs of the poor (Alcock, 1997:69).

Relative: This is a subjective measurement regarding social standards. It requires judgement, and is based on comparing standards of living of the poor versus the standards of other members of the same society who are not poor; therefore, an average standard measure is needed (Alcock, 1997: 69). Lesotho, for example, is poor in comparison to South Africa. Those who are perceived as living in relative poverty, have their basic needs met, but they experience disadvantages in terms of their social environment (De Beer, 1997:2-3). It is likely that disagreement about the nature and extent of poverty can occur within one country (Webster, 1991:16).

2.1.4   Characteristics of the rural poor

Poverty can be characterised by the inability of people (individuals, households, and communities) to gather and maintain sufficient resources to satisfy a socially acceptable minimum living standard. Poor South African citizens perceive poverty to include food insecurity, crowded homes,

unemployment, low-paying jobs, alienation from the community and family fragmentation (Poverty and inequality in South Africa, 1998).

A popular belief held by outsiders (those who do not live in poverty themselves) concerning the poor is that they are lazy, ignorant, stupid, fatalistic, improvident and responsible for their state of poverty. This belief may be reassuring to those not living in poverty, but it is wrong, as the poor are resilient, tough, hard-working and ingenious (Chambers, 1983:103). The poor are in fact excellent at initiating, innovating, and taking responsibility for their own well being (IFAD, 2002:6). The distorted view that outsiders have, can be attributed to the fact that they have no or very little direct contact or interaction with the poor, and when they do, the poor are normally shy and do not like to speak up (Chambers, 1983:104).

An important, but often overlooked concept, is that of the knowledge which the rural people possess, and that this knowledge is superior to that of the outsiders. Therefore it is important that outsiders learn to keep quiet and learn from the rural people (Chambers, 1983:75). Rural people tend to have good indigenous technical knowledge, and they are the first to grasp the concept of poor people and the cause of this poverty (Chambers, 1983:106).

There are five disadvantages that the rural poor have to face on a daily basis, with all five interlocking and forming a vicious circle. These disadvantages are poverty, isolation, physical weakness, powerlessness and vulnerability (Chambers, 1983:103). Figure 2 shows the relationship between these conditions.
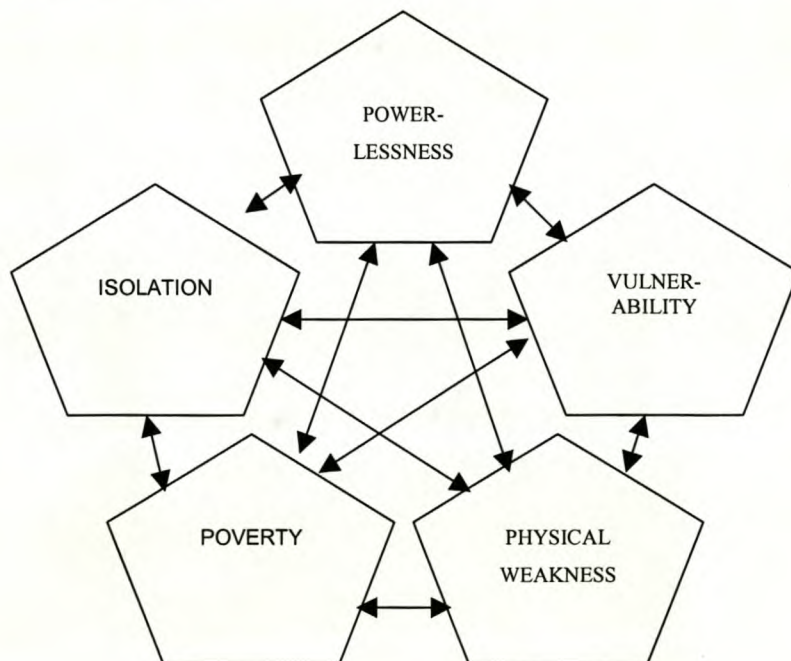
Figure 2:

Deprivation trap (Chambers, 1983:112)

The five elements of the deprivation trap have a direct influence on one another, as shown in table 1 (De Beer, 1997:11-12; Chambers, 1983:112-114).

Table 1: Influence of five elements of poverty on one another

Poverty	Physical weakness	Due to a lack of food, leading to malnutrition.
	Isolation	Due to the inability to pay for transport, schooling, etc.
	Vulnerability	Due to a lack of assets to pay for large expenses, like medical care.
	Powerlessness	Due to a low status, which normally equals a lack of wealth.
Physical weakness	Poverty	Due to low wages, unproductive labour, etc.
	Isolation	Due to a lack of energy to attend gatherings.
	Vulnerability	Due to the inability to work harder to overcome a crisis, like a flood or drought.
	Powerlessness	Due to the lack of participation in community projects because of low energy levels.
Isolation	Poverty	Due to being out of contact, not being able to reach essential economic services.
	Physical weakness	Due to the weaker person not being able to leave the area.
	Vulnerability	This is accentuated by isolation.
	Powerlessness	Not being able to reach political parties, therefore not being able to cast important votes.
Vulnerability	Poverty	Sale of productive assets, like skills, to generate money.
	Physical weakness	Makes people more vulnerable to physical elements.
	Isolation	Economically, being at the mercy of moneylenders and landlords.
	Powerlessness	Due to the increase of dependency on helpers.
Powerless-ness	Poverty	Through limiting access to resources.
	Physical weakness	Due to time and energy devoted to queuing for pensions, thereby using up all available energy.
	Isolation	From access to resources from the state.
	Vulnerability	Due to sudden demands for payments due.

(De Beer, 1997:11-12; Chambers, 1998:112-114).

Some of the negative images outsiders have of the poor may have some truth to it, but taking the background of the poor into consideration, this can be substantiated. An individual's improvidence may occur because of the immediate need for consumption or/and a backlog of essential needs. Perceived laziness may occur as a result of the need to conserve energy. The poor may concentrate on saving their strength for an emergency rather than being active. Fatalism might be an adaptation, where resting will conserve mental and physical energy, and powerlessness and unawareness could be a survival strategy to provide an opportunity for casual work, or to borrow money (Chambers, 1983:106).

Poverty traps are frequent in rural areas, where individuals are not able to take full advantage of the few assets to which they have access. Households previously dependent on an income, may nowadays find themselves with no income and no assets from which to generate an income (Poverty and inequality in South Africa, 1998).

2.1.5   Poverty and gender

As stated in the Rural Poverty Report (2001:28), *Poverty is not gender-neutral. Women have less access to, and control of, land, credit, technology, education and health, and skilled work*. Barnett (1998:148) and the IFAD report (2002:15) state that women are generally dependent on the man in the household, which can make them (i.e. the women) feel poor. If women are employed, their income is generally lower than that of men, even though these women have to supplement the household budget. Women work longer hours, have poorer educational opportunities and health care, and little control over their lives. Besides receiving lower wages than men, women in general occupy positions of less influence and control. It is generally assumed that women can depend on men for material support, therefore they are largely excluded from full participation in the labour market and social security provisions (Alcock, 1997:148). There is an inequitable distribution of resources in households, which raises the issue of who gets to control these resources and who determines the expenditures. Men generally have the primary income, and they therefore exercise the control on how to spend it. When women are paid, the value of their contribution is not recognised, and their income is used to subsidise shortfalls (Alcock, 1997:136).

This can lead to a gender battle, with women in rural areas especially at risk of being poor (RDS, 1995). Alcock (1997:135) mentions that a higher number of women seem to be affected by poverty. They tend to head most households, increasing their chances of being poor. According to the *Poverty and inequality in South Africa* (1998) document, the poverty rate among female-headed households is 60%, whereas the poverty rate among male-headed households are 31%, showing the need for targeting women in rural areas in terms of economic development.

The gender role ascribed to women steers towards that of caring for children, the elderly and the household, while women also need to take care of themselves, creating a situation where they are normally unable to secure support through paid employment and employment-related benefits (Alcock, 1997:145). Long and demanding working hours in many households (especially those headed by women) are worsened during seasonal working periods in rural communities, which leads to seasonal stress (Poverty and inequality in South Africa, 1998).

Flora, Flora, Spears, Swanson, Lapping and Weinberg (1992:285-286) also touch on this phenomenon of especially single parents in rural areas. Single parents generally cannot afford day-care for their children, and are obliged to work in order to generate an income for their family. Alcock (1997:148) sees this loss of women to the labour force as the "opportunity cost" of the caring work. Babysitters are usually female relatives, but by entering the labour market, these are no longer available to provide this caring service.

Apart from these disadvantages pertaining to women, there are also other disadvantages which form barriers which hinder the progress of the rural poor. These will be discussed below.

2.1.6   Barriers to progress regarding the rural poor

Different reasons have been given as to what the major causes of rural poverty are. One such reason has to do with political influence and the other with physical influence. According to the *political view*, the rich gets richer and more powerful, while the poor becomes poorer and less powerful. It is believed that the poor have not gained much from the changes in development, and have therefore lost out through the development process. In the case of the *physical influence*, problems of poverty are seen as population growth and pressure on the environment and its resources. Even though population growth in the rural areas seems to be more rapid than that in the urban areas, the land to support rural communities is becoming smaller and scarcer (Chambers, 1983:38).

The inability of the poor to save money in their current situation means that they have no resources to draw on in the case of an emergency, which accentuates their deprivation. Their ability to "save for a rainy day" has a significant effect on the extent and experience of poverty (Alcock, 1997:108-109). Savings are therefore spent on survival and are not invested in economic opportunities or enterprises (De Beer, 1997:4). Even though saving will alleviate the poverty problem, workers will have to commute a fair distance to get better employment in order to save more. Commuting, however, invariably costs them valuable money and time, which can be seen as a weighted opportunity cost (Flora *et al.*, 1992:286).

Besides all these negative factors, an additional three disadvantages, which are known as *logjams*, can increase the rate of poverty:

- overlap of problems – poorer people have less access to education and health;
- build-up of problems – this reduces the prospect of escaping from poverty, and
- multitarget problems – affecting the access to production-based entitlements (assets, work, land)

(Rural Poverty Report, 2001:24).

2.1.7 Dealing with poverty

In dealing with poverty, the needs of those affected should be looked at and seen to. When considering the term *needs*, one should look beyond merely providing a definition for the biological and physiological demands of the human body for food, shelter and warmth. One should also take into account notions like what is socially accepted. Poverty therefore takes us one step closer to reaching a social and physical concept (Webster, 1991:19).

Rural education needs to be considered when dealing with rural poverty. According to the RDF (1997) *The major rural education issues facing national and provincial governments are how to improve access to education, improve its quality and establish effective democratic structures for school management.*

One way to alleviate poverty in rural communities is to encourage participation in development processes. It is a cheaper strategy than supporting growth biased to the rich, as the poor tend to supply most of the overall cost of investment through labour and extra savings (Shepherd, 1998:90). Participation is important in rural areas as *...rural areas can provide alternative solutions through participation more easily than urban areas can because of the existing social networks and the smaller scale involved* (Flora et al., 1992:294).

However much the rhetoric changes to "participation", "participatory research", "community involvement", and the like, at the end of the day there is still an outsider seeking to change things (Chambers, 1983:141). When dealing with poverty, care should be taken against outside forces wanting to come into the programme to bring about change. Stronger people usually want to come in and change things for a weaker individual. A necessity for the improvement of poverty could lie in the change of power relations and wealth distribution (Chambers, 1983:145). Other social groupings also have a tendency to define for the poor and also for the rest of society what is important, and how society should be structured and managed (Kaufman, 1997:6). *"It is easy to write about what ought to be. The hard question is how, in the real, messy corrupting world to encourage and enable more people to move in these directions: how to multiply the number of*

committed outsiders...who see the need to put the last first, and how to stiffen their courage and will to act." (Chambers, 1983:189).

In the short and medium term, financial constraints affect all areas of human development. The challenge is therefore to give the disadvantaged a voice to speak and a foot to stand on. *"Creating the link between economic growth and human development is probably the most challenging task facing the South African government in terms of achieving a reduction in poverty and inequality."* (Poverty and inequality in South Africa, 1998). The key to a balanced rural economic growth is an increase in rural income, which automatically generates an increase in demand (Shepherd, 1998:90).

It is essential that rural women are targeted for employment, as this will have a significant effect on the reduction of poverty in rural areas (RDS, 1995). To address the issue of poverty, rural areas therefore need to be examined.

2.2   Rural areas, development as a paradigm, and rural development

The research conducted for this study concerns a rural town. A variety of factors can be identified which contribute to the town being classified as rural. These factors, together with the influence of poverty on rural communities, are discussed below. Development in this rural town is of primary concern to the researcher, hence the discussion on rural development and poverty factors.

2.2.1   Characteristics of a rural area

Throughout the world, rural areas tend to have similar characteristics. These areas have a dominant agricultural based economy and there is limited opportunity to mobilise sufficient resources to finance their own development programmes as a result of political marginalisation (ISRDS, 2000:2). These factors pose a major challenge to any type of development.

When aiming to define *rural*, there are different aspects of rural areas that should be considered.

- Size

The population size needs to be considered. Some countries take the specific number of people who reside in an area into account when classifying that area as urban or rural. Different reasons are provided for this, amongst others to define those people who should be served by specific programmes, or to target resources to a specific area (Flora *et al.*, 1992:7).

- Isolation

The isolation of some communities can contribute to their falling under the definition of rural. Some communities might be rather big, but could be isolated. Technology has made it possible to bridge this gap of isolation, reducing it considerably (Flora *et al.*, 1992:8).

- Homogenous cultures

Many people believe that rural communities all share the same culture. This is not true, as there are often numerous cultures living in one community, making it almost impossible to say that rural communities are homogenous (IFAD, 2002:104; Flora *et al.*, 1992:10).

- Economic and social character

The agricultural sector has been stereotyped as being the rural sector, implying that the economic activity focused on extracting natural resources (Flora *et al.*, 1992:10).

Even though the farming aspect might still be feasible for most rural areas, the economic factors of these communities are becoming much more complex, for example opportunities for tourism or for creating a manufacturing base (Flora *et al.*, 1992:13).

According to the Rural Development Strategy (RDS) of 1995, an accepted definition of a rural area does not exist. Only estimates of the number of people residing in rural areas in South Africa are available, so, to be able to get a formal definition, the use of consistent data by actors in rural areas should be ensured. Measurement guidelines regarding rural areas currently used by the South African Government, pertain to those areas with the lowest level of services, greatest average distance to the nearest service point and small municipalities who battle to raise sufficient taxes to provide adequate services.

2.2.2   Rural South Africa

It is estimated that 70% of the poor in South Africa live in rural areas. They have limited incomes, because of the inefficient rural economy not being able to provide them with jobs or self-employment opportunities. They also have a high cost of living as most of their income is spent on basic social services (ISRDS, 2000:6).

Seasonal workers in rural areas are at a disadvantage compared to their colleagues who are permanently employed, as the income of the seasonal worker is erratic and on average 10% less than that of someone who is permanently employed. Their educational qualifications (especially that of farm workers) are generally also at a low level (ISRDS, 2000:9).

Some of the conclusions drawn about rural areas include that rural areas and poverty are diverse and complex realities, which is hard to capture by means of statistics and other measuring devices. When analysing rural poverty, rural-urban linkages should be taken into account, and marginalisation of agriculture should also receive attention (ISRDS, 2000:10).

2.2.3 Development as a new paradigm

The conventional paradigm concentrated on the growth in production and the expansion of the market economy. Economic criteria and factors were a prominent aspect of development and it dominated decision-making. Participation was generally only included as an afterthought. In rural development, the conventional paradigm was inflexible and mechanical, and it did not have the ability to promote sustainable development (Shepherd, 1998:2). As mentioned by Båge, president of the International Fund for Agricultural Development (IFAD, 2002:iv), the maxim during the 1980s was about "getting the prices right", thereby pointing towards the traditional paradigm where only economic factors were considered for development.

In contrast with this, the new paradigm is human-centred, "coming from within". The focus made a dramatic shift from resource-based strategies to participation-based (interactive) strategies. Another feature of the new paradigm is that it afforded different development teams who were busy with projects, the opportunity to interact and to learn from each another. They could then realise their ideals once they were converted into practical applications (Sato & Smith, 1996:91).

Sheperd (1998:10) notes certain shifts that occurred between the old and new paradigms. These shifts are presented in Table 2.

Table 2: Comparison between the old and new development paradigm

OLD	NEW
Industrial approach	Organic + holistic approach
Profit objective	Sustainable improvement objective
Technocratic + exclusive approach	Participatory + inclusive approach
Resource control by large firms	Local resource management

(Shepherd, 1998:10)

> *People do not accept new paradigms through arguments and reason. The switch is made through experiencing the new phenomenon* (Sato & Smith, 1996:92).

The new paradigm could therefore be seen as a set of interconnected clusters of ideas and/or theories. It would be possible to move around in a circle when starting with one of these theories (Shepherd, 1998:263), creating a direct link with Participatory Action Research (PAR).

2.2.4   Rural development

There is no agreement as to an exact description of the concept of rural development. Various authors have different ideas of what it constitutes. Barnett (1998:173,183) states that the concept is full of judgements, especially political value judgements, but that development embraces the quality of life, like spiritual welfare, nutritional status, gaining an education, and this author then sees the word *development* as a *value* word, which implicates the desirability of change. Cowen and Shenton (1995:27) mention that development can be good, but it can also be bad. By this is understood that one can get *over*-development and *under*-development.

Rural development has been identified in the Integrated Sustainable Rural Development Strategy report (ISRDS, 2000:19) as: *...multi-dimensional, encompassing improved provision of services, enhanced opportunities for income-generation and local economic development, improved physical infrastructure, social cohesion and physical security within rural communities, active representation in local political processes, and effective provision for the vulnerable...*

Rural development is therefore a much broader concept than just poverty alleviation by means of social programmes. Change needs to be facilitated to enable people to increase their earnings and to invest in themselves and their communities. They should be able to identify opportunities and to act on them (ISRDS, 2000:19).

The term *rural development* has gained more importance during the last decade, with new policies being introduced at government level, especially to reduce poverty. Even though this might be the case, the concept has been around for quite some time. Early in the 1970s, it was defined by Pearson (1970:9) as *...the balance between social progress and economic growth... Development* is defined in terms of its *economic sense* and its *social side*. A very important point that Pearson (1970:9) mentions, is the fact that participation, by the people in their own environment, is of vital importance for development to take place.

Major *goals* for rural development in South Africa have been set up by RDS (1995):
- to help rural people to set priorities for the development in their communities;
- to create greater equality in the use of resources, especially in land, water, financial services and management, through training and capacity-building;
- to increase farm and non-farm production to increase the incomes of rural people;

- to increase the access to services through providing the physical infrastructure and social services;
- to improve the spatial economy of rural South Africa, and
- to ensure the security and safety of the rural people.

2.2.5   Rural development constraints and opportunities

Rural development constraints in South Africa come from a long history which includes that of 45 years of discrimination and through apartheid policies. Autocracy, corruption in service provision and developmental issues and decision-making all play a vital role in some of the constraints. Another constraint appeared in the form of many large authorities not being willing to lose control over resources, with bureaucrats on the other hand creating more constraints as they dislike the slow progress associated with democratic development processes. Once more, it can be said that these constraints are more severe for rural women than for men (as will be discussed later) (RDS, 1995).

Despite the different constraints concerning rural development mentioned above, opportunities were identified in the RDS report (1995) which can be listed as follows:
- rural people's enthusiasm and willingness to work;
- their eagerness to learn, and
- their wish to be integrated into the national economy (thereby to unlock rural entrepreneurship potential).

For any of these developments opportunities to take place, the community should function as a unit, and should solve common problems together. Therefore the community has to believe that their working together can make a difference, and they should therefore organise themselves in order to take care of their shared needs collectively (Flora *et al.*, 1992:299).

Unfortunately there are only a small number of cases that show how development programmes directly benefit the poor. One of the major weaknesses of policies is that the perceptions held by the ordinary people concerning development is not examined thoroughly. Therefore it becomes important to consider development perceptions of those who will be directly affected by it (Webster, 1991:36).

Any development programme should be built around the communities and the people living in these communities, the assets, opportunities and the strategies of the communities, as these form the nucleus of any programme (IFAD, 2002:26). *...(R)ural development greatly affects the lives of the people, they should have a strong hand in setting the agenda and the priorities. A dynamic process of combined government action, with the participation of people in rural areas, must be set*

in motion to realise a rapid and sustained reduction in absolute poverty (RDF, 1997). For rural development to occur, an attack on poverty is necessary and one of the ways of doing this is through entrepreneurial development. Entrepreneurial development, its characteristics, the financing aspects and the necessary resource management will be discussed in the section below, to explain the advantages of entrepreneurial development for people who need to be able to develop economically.

2.3 Entrepreneurial development

In the past, many South Africans have been denied opportunities and access to education and skills development. A balance between maintaining a stable growth economy and redressing past inequalities should be reached to ensure economic empowerment (Government Gazette, 1997:59). Some of the constraints faced by the rural people stem from a long period of apartheid and discrimination in South Africa, which need to be addressed by the South African government regarding economic development (RDF, 1997). Economic empowerment of the historically disadvantaged South Africans is seen as a democratising process, and it is needed by the South African economy in order to perform positively. The best way to deal with this problem is to make productive use of the whole economically active population to stimulate economic growth (Government Gazette, 1997:59).

Links have been established between empowerment, growth, and poverty reduction. With an empowerment agenda, the aim is to reduce inequality by broadening human capabilities, thereby making the distribution of tangible assets easier. This in turn creates the potential to enhance the poverty-reducing development effort. People should have the ability to take advantage of economic opportunities, which will give them more freedom to make economic decisions, while at the same time enhancing developmental effectiveness (World Bank Report, 2001a: 5).

Many poor households tend to diversify their sources of income to help protect them against income risks (Shepherd, 1998: 117). If a wider range of jobs were made available, more services could be provided, more markets could be created, and more money would circulate in those areas (RDS, 1995).

An increasing number of young individuals in rural areas are finding it increasingly more difficult to find employment in those areas. If they do not receive the proper training and employment opportunities, they also face a lifetime of poverty, lack of fulfilment, and exposure to crime and violence (RDF, 1997). One way of dealing with this problem is to educate them to become entrepreneurs, thereby enabling them to create their own employment to lift them out of the poverty cycle.

2.3.1   Entrepreneurship

One of the reasons for the encouragement of entrepreneurship is that small businesses are seen as major factors in job creation, which is of great importance in Third World rural areas where poverty and unemployment are high. Small businesses influence the economy through multiplier and accelerator effects, giving entrepreneurs the opportunity to have a macroeconomic impact on developing societies, leading to economic development (Boshoff, Bennett & Owusu, 1992:48).

Entrepreneurship has been promoted as the critical ingredient for the transformation of rural economies and their development (Shepherd, 1998:102). It can be seen as behaviour rather than as a personality trait. Anyone can learn to behave in the entrepreneurial manner (Drucker, 1994:23). *Entrepreneurship represents the willingness and initiative needed to identify opportunities, invest capital and take the risk of failure or success* (Burkey, 1993:36).

Any activity, no matter how simple it is, requires some form of management skills and entrepreneurial managing of time and available resources in making decisions on how to use such resources (Burkey, 1993:36).

It is very difficult to pinpoint exactly who can be described as an entrepreneur. Those people who are successful, come from very diverse backgrounds, making it almost impossible to explain what it takes to create a successful enterprise (Siropolis, 1994:37). No entrepreneur will conform to specific standards or guidelines (Drucker, 1994:23). One thing that is certain about entrepreneurs, is that they create their own businesses though hard work and by using their own ideas. Entrepreneurs in general have an "instinct" for opportunity and a good sense of timing (Siropolis, 1994:37-40).

Entrepreneurs usually exhibit some common traits, as highlighted by Siropolis (1994:43-48). They show a desire for self-expression, they tackle the unknown and tend to do things differently. Entrepreneurs believe in themselves and also believe that they can bring about change. They have a desire to excel, resulting in them working long and hard hours. They like to set meaningful goals for themselves, but the achievement of these are not always of prime importance. Entrepreneurs also want to be held accountable for any successes (and failures).

Entrepreneurship is described by Burkey (1993:181) as *...the amount of management skills as well as the willingness to risk investing the factors of production....* The ability to be an entrepreneur needs to be situated inside the individual him/herself.

A major aspect of being an entrepreneur is being able to deal with the financial aspects of the business, as money is the determining factor as to whether the entrepreneur is successful or not.

Other resources, like time and energy, should also be managed efficiently to ensure the success of the business.

2.3.2   Financing aspects and resource management of entrepreneurs

A positive relationship should be formed between savings, capital, investment and production to promote positive economic development of the entrepreneur. Savings, or credit if it can be acquired, are crucial to assist in breaking the poverty cycle (Burkey, 1993:182). As Shepherd (1998:102) points out, individuals who are trying to increase their security and survival chances, return to labour practices, but this security can be increased by improving their access to working capital, raw materials and different markets. Figure 3 shows the relationship between these elements of savings and capital.
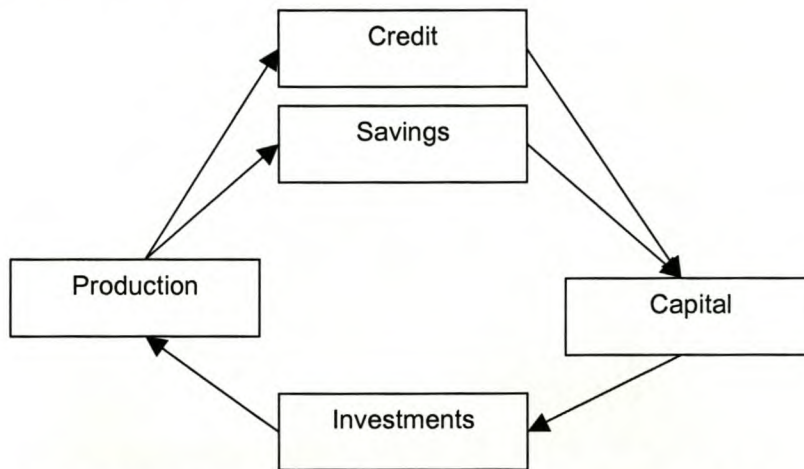
Figure 3: Diagrammatic representation of the relationship between savings, credit, capital, investments and production (adapted from Burkey, 1993:182).

An essential factor regarding economic development is the attention that should be given to the rural person as an economic agent. This area has in the past been neglected. According to Howe (IFAD, 2002:vi), one of the reasons for this is the disappointing results from past rural development assistance. Rural enterprises need to have access to capital, technology and fair exchange terms. These factors are vital determinants of rural income which in turn can be applied to rural poverty (IFAD, 2002:101).

Formal credit programmes have in the past failed to reach the poor, who are often the majority of rural people. In South Africa, the present government has failed to encourage the development of financial services in rural areas, and the banking system, being very conservative, very seldom supports rural enterprises (RDF, 1997). To receive formal credit, the lender had to provide some form of collateral like property, or a personal guarantor, which many of the rural poor did not have.

This led to market failure. If this barrier could be removed, many small businesses would benefit from policies which remove discrimination against them (Shepherd, 1998:103,112).

If any economic activity is to lead to development, it should be done on a sustainable basis; it has to be profitable. The development process will stagnate or fail if the sequence of saving, investment and reinvestment fails. *Economic development is a process by which people through their own individual/or joint efforts boost production for direct consumption and to have surplus to sell for cash* (Burkey, 1993:36).

The management of resources is vitally important if entrepreneurs are to prosper in their activities. These resources include time, money, energy and the identification of other resource materials. If resource management is not present, the business is bound to fail.

Any activity, no matter how simple it is, requires some form of management skills and entrepreneurial managing of time and available resources, and making decisions on how to use these resources effectively and efficiently (Burkey, 1993:36). This type of resource management should be used to save money for starting a business, rather than spending it on something not important, like presents or parties. Many poor people fall in the vicious cycle where they do not have anything to save, meaning that they cannot build up stock on savings which could be ploughed into a business for them to be able to save more. Money should therefore rather be invested in new activities, together with improving present production, if it exists (Burkey, 1993:180).

According to Burkey (1993:150), women who are poor are generally regarded as having better resource management capabilities than men in the same position. Many women prioritise income-generating opportunities and show interest in labour-saving devices. Activities like sewing and needlework are fundamental elements of any programme to motivate rural people, and should not be underestimated as they can provide these people with an income. Women also have to deal with money matters in general, including buying food and clothing and looking after financial family affairs, even though they do not always earn the money.

People need to realise that they have the power within themselves to solve their own problems, and that they should utilise their past experiences in doing this. The primary goal is for them to have attitudes of self-confidence and values, as well as a limited dependency on outside forces (Burkey 1993:210).

Economic growth does not necessarily alleviate poverty, but with the implementation of direct measures, it could help. Some of these direct measures are development and employment programmes, savings and credit schemes. A focus point which could assist with the problem of

poverty and economic stability, is the availability for financing of small businesses (Shepherd, 1998:118).

The teaching of new skills is important to give people in the informal sector of the economy the opportunity to participate more effectively in economic activities. This makes adult education an ideal method ideal to target this problem of unemployment.

2. 4   Adult education

With the expansion of the population, the need for education increases. Unfortunately many developing countries seem to have reached their limit regarding formal education systems, which makes non-formal education an important vehicle to transmit knowledge and skills. Non-formal adult education gives people a second chance to gain useful skills and knowledge, which might have been lost due to not having had formal schooling (Stromquist, 1988:6).

People need to be educated on a continuous basis if they are to keep up with the pressures and the speed at which globalisation is taking place. Globalisation increases competitiveness, making the low-skill trap dangerous for both the economy and the social structure of society. If their skills and knowledge become outdated, society and its structures can disintegrate, leading to more poverty and lower skills, which have a negative impact on the economy. This is reinforced by Smith and Spurling (1999:3) when they state that for many people low self-esteem is enforced by the failure of the education system. This leads to a widening gap in society.

Adult education still has a long way to go to reach one universal understanding. It is also clouded by myths which hold that all adult learning is a joyful experience, that adults are innately self-directed learners, that good educational practice meets those needs stated by the learners, and that there exists a unique adult learning process and unique adult practice form (Brookfield, 1995:1). But, according to Knowles (1980:25), the term *adult education* can be described in three ways, the first being that it is a process where adult individuals acquire new knowledge, values, understanding, interests, and attitudes. In short, this process leads to self-development. Secondly, it can be described as a set of organised activities that is carried out to reach certain educational objectives. Thirdly, by combining processes and activities, adult education can be seen as a movement or field of social practice.

A useful framework by which to define adult education has been offered by Houle (1972, quoted by Boone, 1980:3) namely: *...the process by which men and women (alone, in groups, or in institutional settings) seek to improve themselves or society by increasing their skills, knowledge, or sensitiveness; or it is a process by which individuals, groups, or institutions try to help men and women improve these ways...* Adult education can be seen as a process system, where the

emphasis is on both human development and knowledge delivery. It plays a vital role in preparing adults to contribute to progress and the running of affairs (Tri, 1986:44). Wildemeersch (1992:165) sees the central task of adult education to be a stimulation and facilitation process to help organise the ongoing questioning of the foundations of an individual or collective life-project together with life-choices.

A goal of adult education is to help its learners to identify, interpret and resolve their specific requirements. The changes in society, together with the changing needs and interests, demand continuous and comprehensive lifelong education. It is therefore a means by which society can assist its adults in gaining the knowledge and coping skills necessary to adjust to the different role changes required in adult life (Boone, 1980:2).

Tri (1986:45-46) identified the aims and principles of adult education stated below. These aims and principles are identified according to what they should be based upon, and what they should contribute towards.

The aims of adult education should be to contribute to:
- develop the ability to play an active role in the progress in society to achieve social justice and a critical understanding of social changes and contemporary problems;
- develop the ability of learning to learn;
- promote increased awareness of, give effect to different communication forms and solidarity at family, local and regional levels;
- create respect for and understanding of the diversity of cultures and customs, on national and international level;
- develop the skills to acquire new knowledge, behaviour forms or attitudes conducive to the full maturity of the personality and creative ability;
- encourage increased awareness of relationships between people and their cultural and physical environment; to foster a desire for protecting nature, public property and common heritage;
- develop judgement and discernment of messages conveyed through mass communication media;
- develop the ability to make creative use of leisure and making it beneficial to individuals and community , and
- promote peace work, co-operation and international understanding (Tri, 1986:45).

According to Tri (1986:46), the principles stated above should be based on the following aims:
- needs of the participants: should be organised in a flexible manner, and should be adapted to the actual conditions of everyday work and life;
- it should stimulate and retain the adult learner's interest, and strengthen their self-reliance;

- by appealing to their experience and using its diversity, contributing to the development of the entire community;
- recognition that all participants can play a vital role of both educator and learner in the education process (based on their own life experiences and cultures);
- recognising the actual or potential educational value of their various experiences (i. e. solving day-to-day problems), and
- developing cultural aspirations and towards social justice.

2.4.1 Critical elements of adult education

Different critical elements of adult education are highlighted, which should be applied and facilitated by any adult educator during the presentation of a programme or project.

2.4.1.1 Self-directed learning

Self-directed learning can be described as the process by which individuals take initiative, without consulting others, to diagnose their own learning needs, formulate their goals, identify resources and evaluate learning outcomes. It can be seen as the philosophy of adult education, creating awareness among people that they should originate their own feelings and thinking (Mezirow, 1985:17). The idea of self-directed learning can be seen as firmly embedded in the tradition of emancipatory adult education (Hammond & Collins, 1991; quoted by Brookfield, 1995:2). Adults are actors and are seen as equal to educators in the learning process, with their own relativist views concerning the nature of knowledge (Maehl, 2000:50).

One of the problems with self-directed learning that has emerged can be ascribed to the fact that the cross-cultural dimension of the concept had been ignored. The educator should develop an understanding of the learner, taking into account traditional forms of education. Educators should also take into account the learner's previous experiences, nature of the learner's learning practices and political time frames, as all these factors will have an effect on the learner's decision to learn. More needs to be known about how adults engage in self-directed learning using social networks and peer support groups (Brookfield, 1995:3).

To participate freely in the self-directed learning process, the learner needs full knowledge about possible alternatives together with freedom from self-deception and coercion. This freedom requires a comprehension of cultural, historical, and biographical reasons for the needs, wants and interests of the learner. *Such self-knowledge is a prerequisite for autonomy in self-directed learning* (Mezirow, 1985:27).

2.4.1.2 Critical reflection

According to Brookfield (1995:3), the idea of critical reflection focuses on three interrelated processes:

- adults question and replace or reframe assumptions that might have been uncritically accepted as common sense;
- adults have alternative perspectives on previously taken-for-granted ideas, reasoning forms, actions and ideologies, and
- adults come to recognise the hegemonic aspects of dominant cultural values.

Adults should be taught the ability to penetrate superficial meaning to enable them to expose the underlying significance of a situation. This process is crucial if knowledge is to advance, promoting a wider understanding of a given situation. Caution should be taken that this process of understanding the underlying significance is not negatively influenced by neglect or power domination. People in powerful positions might not allow adults the time to explore other possible meanings to a situation, as they (the authorities) see themselves as having the right answers and ideas (Smith & Spurling, 1999:6).

2.4.1.3 Experiential learning

Walkin (1990:32) defines experiential learning as: *...the knowledge and skills acquired through life and work experience and study which are not formally attested through any educational or professional certification...* Participants have the opportunity to learn outside college hours, and it provides a store of knowledge that is built up over many years. It is crucial that adult teaching must be grounded in the experience of these adults, with the experiences representing a resource. Some experiential methods that could be used are games, simulations, case studies, and role-play. Knowles (1980:50) states that adults should be in educational situations where their experiences are used to prevent them from feeling minimised and rejected. The core of the learning process is therefore based on the experience of the individual.

Two major pitfalls are inherent in this process. Firstly, experience should not be thought of as an objectively neutral phenomenon, as all experience is culturally framed and shaped. All experience will change according to the language and categories of analysis used. Secondly, the length or quantity of experience is not necessarily linked to its intensity or richness. No experience is innocent or free from cultural contradictions (Brookfield, 1995:4).

2.4.1.4 Learning to learn

There is a lack of a commonly agreed definition for learning how to learn. *Learning to learn* generally functions as an all-encompassing term for attempts by adults to develop their own insights into their learning. Learning involves the self-conscious awareness of how adults know what they know, or reasoning, assumptions, evidence and justifications underlying the beliefs that

something is true. Developing the capacity to learn cannot be left solely to primary and secondary education, but should be seen as a lifelong learning project. It exists far beyond academic boundaries. *Learning is a collective process involving the cultural formation and reproduction of symbols and meaning perspectives* (Brookfield, 1995:7).

2.4.2   How adult education evolved

During the 1960s, certain changes in the development perception put emphasis on education as a central element in the comprehensive process, with the ultimate purpose of development being a better life for all. Economic growth and human resource development were introduced to alleviate poverty, together with raising social consciousness by increasing opportunities for all (Ghosh, 1989:76-77). Societies did not only face an economic challenge, but a cultural one as well. Equal opportunities for men and women in the family setting, workplace, and civic society brought with it resistance (Wildemeersch, 1992:156).

The challenge of social transformations that have occurred in the advanced industrial societies and wider world scene has caused some pressure on adult education for it to make a stance towards these transformations. These challenges intrude upon all societies, and the world we live in has become overwhelmingly complex and differentiated, continually presenting new risks. Structural unemployment has turned a large part of the active population into passive victims of economic rationality, victimising the human race. *Environment and market-economy and environment and labour are on conflicting terms with each other* (Wildemeersch, 1992:156).

Education and training are therefore important because of the fast moving pace of economic and technological transformation in the national economy and the interconnected global economy. In the modern world of knowledge and technological explosion, the mission of education is to produce competent individuals who can apply their knowledge under changing circumstances. For this to happen, lifelong and self-directed learning is needed (Knowles, 1980:19). Expanding an individual's capabilities through education will promote general social and economic well being (Maehl, 2000:6).

Fordham (1993, quoted by Smith, 2001a:2) remarks that one of the reasons for the increased importance of non-formal education was the fact that the formal educational system had adapted too slowly to the socio-economic changes occurring around it. Because of the conservatism of the educational system and the inertia of society itself, this however halted the progress of formal education. He also suggests that educational policies tend to follow rather than lead other social trends, leading to the conclusion that change would have to come not only from within the formal schooling sector, but also from the wider society.

Social and economic development depended on bringing about changes in the way that people thought. During the 1970s, many of the non-socialist countries were beginning to turn to the idea of mass non-formal education, because of the large increase in illiteracy in those areas. *The development process is in fact an education process, or rather it should unfailingly be viewed as such. We cannot therefore conceive of development in the absence of education any more than education in the absence of development* (Faundez, 1988, quoted by Smith, 2001a:4).

(D)ividing formal education from out of school education or so-called non-formal education is artificial in many ways. But in some countries, this division reflects the gulf between government provision through the school system, on the one hand, and the needs and interests of marginal populations who are most alienated from the system on the other (Graham-Brown, 1991, quoted by Smith, 2001a:3). The range of programmes that have taken on the term of non-formal are many and various, including literacy programmes, basic education for adults, agricultural training, political training, to name but a few.

Adult education programmes can take on three different formats, namely formal, informal and non-formal. These three types will be discussed in more detail below.

2.4.3   Types of education (formal, informal and non-formal)

Three terms are used in the literature as types of education, namely *formal*, *informal* and *non-formal*. A thorough definition of each of the terms is given below, followed by a brief description of the differences between the types. As a summary, the three definitions of education can be expounded as follows. *Formal education* can be linked with schools and other training institutions (technikons, universities), *non-formal* with the community groups and organisations, and *informal* with friends and colleagues (Smith, 2001a:3). *Non-formal education* can be seen as related to lifelong learning. It is about the acknowledgement of the importance of education, learning and training which occur outside the traditional institutions (Smith, 2001a:1).

2.4.3.1 Three educational terms

Formal education: This is a hierarchically-structured, chronologically-graded education system, which runs from primary school, through to university. This type of education involves general academic studies together with different specialised activities and institutions. It is generally full-time and is a type of professional training (Prosser & Ahmed, 1973, quoted by Smith, 2001a:2).

Informal education: This is a lifelong process in which individuals acquire values, knowledge, attitudes and skills from their everyday experiences, together with influences from education, and resources in their surrounding environment. This environment can be their family, neighbours,

places of working or playing, the market place, library and the mass media (Prosser & Ahmed, 1973, quoted by Smith, 2001a:2).

Non-formal education: This is an organised educational activity that takes place outside a formal established educational facility. It might be part of a broader activity, or operate on a separate basis. It aims to serve the needs of individuals and their learning objectives (Prosser & Ahmed, 1973, quoted by Smith, 2001a:2).

The underlying principle here is that all three of these types enhance, support and respect one another. The strengths and weaknesses of each should be considered, and a solution should be found which would most benefit the learners (Fox, 1988:3).

The contrasts between formal and non-formal education are tabulated below. The table analyses non-formal educational programmes in terms of purpose, timing, content delivery systems and control, as compared to formal programmes.

Table 3: Contrast between formal and non-formal adult education

	FORMAL EDUCATION	NON-FORMAL EDUCATION
PURPOSES	Long-term and general	Short-term and specific
	Based on credentials	Not based on credentials
TIMING	Long cycle	Short cycle
	Preparatory	Recurrent
	Full-time	Part-time
CONTENT	Standardised	Individualised
	Input-centred	Output-centred
	Academic	Practical
	Entry requirements will determine clientele	Clientele determine entry requirements
DELIVERY SYSTEM	Institution-based, isolated from environment	Environment-based, community related
	Rigidly structured	Flexible
	Educator-centred and resource intensive	Learner-centred and resource saving
CONTROL	External	Self-governing
	Hierarchical	Democratic

(Fordham, 1993, quoted by Smith, 2001a:4-5).

Several characteristics can be related to that of non-formal education, namely that it:

- takes into account the relevance of disadvantaged groups;
- is concerned with specific categories of people;

- focuses on clearly defined purposes;
- is flexible regarding organisations and methods;
- takes place outside traditional framework and system;
- is organised with pre-determined objectives in mind;
- has a sequential learning structure which might not always be graded, and
- is flexible in terms of time and duration of learning, age group, content, methodology and evaluation procedures (Smith, 2001a:1; Fox, 1988:1).

2.4.4   Adults as learners

All adults have a strong self-concept and a choice to manage their own affairs (Maehl, 2000:49). Adults have a rich background of experience and knowledge that should be incorporated into their learning process. Credit should be given to the knowledge and experience brought into a programme by the participants. Many adults are also pragmatic in their learning, as they want to apply their learning to their immediate situation, expecting to be able to make almost immediate use of the information or skills they have recently acquired (Caffarella, 1994:30; Walkin, 1990:16).

Participants who get the opportunity to assist in the planning process, tend to feel more committed to the decisions that are made. If the facilitator does all the planning, participants could feel apathetic towards the plans for the programme. They might build up resentment as a result and could even withdraw (Knowles, 1980:48). Adults enter into a learning environment with a great volume and different kinds of experiences. Self-identity is derived from these experiences, as they "are what they have done" (Knowles, 1980:50). If adults feel that their experiences are not being utilised during the course of a programme, or that it is minimised, they could feel rejected.

The learning process never stops. It is ongoing, starting at birth and ending at death. A learner should want to learn and should show an interest in the learning material in order to maintain attention. Motivation, attention and interest are very closely related in this case (Walkin, 1990:1). The learning process can be formal or informal, depending on the location, participants, and the situation. Learning could also be intentional (school, university) or unintentional (infants learning without the conscious intention of the learning process) (Smith & Spurling, 1999:4). However, new information is best acquired when it builds on past knowledge and experience, and participants are more motivated to learn when different teaching methods are employed. The learning process could take place in an independent mode or a self-reliant mode, or it could be interdependent and collaborative (Caffarella, 1994:30). To attain and to maintain interest in the learning process, constant feedback with progress reports should be carried out, giving results and praises to participants (Walkin, 1990:2).

The development of a favourable learning attitude among participants is the cornerstone of the learning process. An important element is *motivation*, by which the behaviour necessary to satisfy a need or attain a goal, is aroused, controlled and sustained. It should be kept in mind that only the participants can reach this goal, and that the facilitator should merely assist them in this process (Walkin, 1990:1).

Motivating factors can be extrinsic or intrinsic. In the case of an extrinsic motivator, the satisfaction of needs is important, e.g. the desire to be recognised or praised, or a monetary reward. In the case of an intrinsic motivator however, the learner experiences a form of inner satisfaction and a feeling of accomplishment after overcoming an obstacle. There are no obvious material rewards involved in this latter type of motivation (Walkin, 1990:1).

There are a variety of barriers to adult learning which can have a negative effect on the attitude the learner has towards learning. These barriers could be self-imposed or they could result from negative past experiences. Some adults might feel that they are too old to learn, they might have certain physical impairments, or they might feel that they have been out of the learning game for too long (and they might especially be afraid to tackle new technology) (Walkin, 1990:17). Adults that have been away from the learning process for a long time, could lack the confidence to apply themselves to the process of learning, which will prevent them from participating (Knowles, 1980:55).

Another barrier flows from the mistake that educators make when they see adults as a homogenous group. Because of the large numbers of participants, different learning needs, preferences and circumstances exist. If a high degree of flexibility and recognition of adult characteristics is not maintained, adults might be unable or unwilling to participate (Maehl, 2000:17).

Yet another barrier to adult education and the learning process is that adults have been conditioned to merely accept (rather than to give as well) during previous schooling, where they were dependent, passive recipients of information transmitted to them. This one-sided process sometimes creates a dependent personality still persistent in many adult learners. These adults are therefore afraid to take responsibility for their own learning. To remove this barrier, the learning activities should be made enjoyable, and the location chosen should preferably be non-academic to prevent the learners from feeling that they are still at school (Knowles, 1980:46).

Impressions are gained from surroundings, and learning can therefore occur at a conscious level (classroom situation) or at a sub-conscious level, through day-to-day exercises (Daines, Daines & Graham, 1994:3). The concept of lifelong learning should therefore be practised by all individuals,

as the accelerated pace of the changing world needs constant adaptation for which lifelong learning is needed (Knowles, 1980:19).

2.4.5 Lifelong learning

UNESCO issued a statement concerning lifelong learning, stating a crucial goal of the process: *Every person must be in a position to keep learning throughout his life. Education must be carried on at all ages...according to each individual's needs and convenience...it is not an educational system, but a principle on which the overall organization of the system is founded* (Maehl, 2000:4). With lifelong learning, the primary concern of adult education must be the provision of resources and support for self-directed individuals (Knowles, 1980:19).

Lifelong education is associated with a global view on the practice of education and the theoretical reflection on it. Different theoretical approaches to lifelong education can be employed, all based on continuity, creativity, and learning.

2.4.5.1 Continuity

As mentioned previously, the learning process is continuous. The educational future of the individual will largely depend on the type of education that was received during the early development stages, the experiences during higher education, and the lessons of life, which were acquired in and through the family environment. The agents of the educational process are individuals who are acting in the process of their own development. By emphasising the role of the individual learner, confidence is entrusted in the learner, giving him or her the power to bring about change in their personal life (Lengrand, 1986:11).

> *Continual learning is nothing less than a developmental process of learning as a way of being. It is certainly never over or complete; a learner can never be sure that he or she has made hardly more than a start* (Maehl, 2000:24).

2.4.5.2 Creativity

Creativity is not only about production; it concerns co-operating in the creation of the self. Through self-creation individuals can outgrow their immediate environment and escape a pre-determined destiny. By taking part in their own creation, individuals become citizens, but also thinkers or artists or workers. If an individual is ignorant of his/her potentialities, this development stage will not go further than the initial creative stages, preventing development from occurring successfully. People have to make an effort to practice creativity, but if the basic conditions of life (e.g. lack of sufficient income, inadequate housing) prohibit this, these conditions will become obstacles to the growth of the individual (Lengrand, 1986:12).

2.4.5.3 Learning

The purpose of learning is to enable people to comprehend the meaning of their experiences, and to realise the value of these experiences in their lives. For most people, learning takes place by setting out new experiences or an aspect of an experience which is not explicit, seeking to validate a personal interpretation of its meaning (Mezirow, 1985:17).

Any learning that takes place, is a *process* carried out by individuals or groups, and the outputs (what is acquired) count as the knowledge and the skills that were gained. The learning process does not need to be understood while it is taking place, as the significance of the learning might only dawn on the individual at a later stage (Smith & Spurling, 1999:4).

Learning entails those activities, practices and reflections which make individuals become their own person, but at different personality levels (Lengrand, 1986:13). Learning can be divided into different fields, namely communication, space, art, politics, ethics, technology, and spirit. When put together, learning and lifelong education are intimately linked (Lengrand, 1986:14).

Table 4 summarises the different elements of lifelong learning with regard to their features and moral aspects. These elements can be seen as the characteristics of this type of learning, and should be present during any stage of the process.

Table 4: Elements of lifelong learning

Features	Moral aspect
• Occurs throughout the lifespan • Learning has widest possible boundaries • Continuity allows for delays, while maintaining momentum • Planning is and ongoing intent to learn	• Personal commitment • Social commitment • Respect for others • Respect for truth

(Smith & Spurling, 1999:10)

Smith (2001b:1-3) discusses three distinctive elements which are identified as being found in most of the adult education and lifelong programmes, mostly in the southern parts of the Third World. These elements should be considered critically when making use of adult education programmes in these southern countries. Firstly, there is the connected issue of poverty, debt, and economic development. Many of these countries are characterised by long-standing and continuing inequalities in political and economic relationships, for instance between the industrialised countries in the North and the Third World countries in the South. The southern countries are also subject to external economic pressure, which has a constraining effect on education and other social policies. According to Brookfield (1985:76), an inequality of status exists, and the access to

resources between genders differ. Many southern countries are finding it difficult to deal with the political and economic changes taking place, as they can still remember their colonial past from which they had to break away in order to develop their own political culture and practice. Lastly, many of these southern countries do not have a stable or comprehensive primary or secondary education system, compulsory schooling is not always enforced, and limited access to schooling leads to a high rate of illiteracy. It is in the best interest of an economic, political and social aspect to ensure that as many of society's members are engaged in learning at any one time (Brookfield, 1985:76-77).

Modern society is changing rapidly and continuously on all levels, namely economic, cultural, social, technological and environmental. Knowledge gained at any point in an individual's life generally becomes obsolete within a short period of time, and skills that people have might have become obsolete, outdated and unusable very soon after it had been acquired (Knowles, 1980:41).

For learning to take place, individuals need an educator to help them gain access to knowledge which they can use. The educator has the responsibility to help adults learn and become more competent (Knowles, 1980:26). In the next section, the adult educator will be discussed in more detail.

2.4.6   The adult educator

It is quite possible for educators (facilitators) to view independent learners as irrelevant or competitive to their work. Educators, for instance, might try to run the programme on a cost-recovery or profit basis, which will lead to the exclusion of adults who prefer not to attend formal educational institutions, and who conduct their own private learning efforts. At a basic ethical level, adult educators however, have a moral duty to try and assist those who want to learn. Educators should not see these adults learning on their own as participating in some form of defying act of rejection aimed at the formal sector. Adults might interact their self-directed pursuit with the enrolment in a formal institution. Those educators who assist self-directed learners enter valuable trust-building relationships with them, which contribute to the word-of-mouth message and the recommendations to spread and act as motivators. It is impossible to conceive of lifelong education if educators themselves do not become involved in the efforts of self-directed learners (Brookfield, 1985:76-77).

Educators in the adult field should be concerned with the learner's self-development, expanding the horizons of the individual learner. Learners should be encouraged to make use of their own inherent resources, to ensure the possibility of self-actualisation. Adults who are well informed, creative, and responsible, have a greater chance to survive and to deal effectively with the future,

while at the same time making a positive contribution to society (Boone, 1980:4). Adult educators should at all times be concerned with and given responsibility of managing an intentional learning process (Smith & Spurling, 1999:5). Lindeman (1926, quoted by Boone, 1980:8) many years ago pointed out that the approach to adult education should be via the route of situations and not via subjects. The curriculum for adult education should therefore be built around the needs of the students and their inherent interests. People find themselves in a particular situation which generally calls for some kind of adjustment, and this is the point where adult education usually starts. Facilitators and their programme content should therefore give way to the interests of the learner.

Adult education professionals might be expected to handle many challenges, which could imply that they should be a master of all trades. But, first and foremost it is important that they should be allowed to remain experts in the field of adult education. Respect among both the participants and within the broader social context, should be gained by professionals through skilful expertise. This expertise is generally aimed at those who express various questions and answers regarding their life-options. The core dimension in adult education is that of communicative action that challenges taken-for-granted assumptions (Wildemeersch, 1992:165).

Adults have unique characteristics that require different principles and techniques when working with them, which differ from the principles and techniques employed when working with children. The adult educator working with adults learners, are trained specialists in their fields once they have acquired these specific principles and techniques. Nowadays, adult educators are referred to as *change agents*, as they now have a developmental function. *Their part in this process is that of helper, guide, encourager, consultant, and resource* (Knowles, 1980:37).

Most adults want to be recognised for their achievements in the form of the qualifications they receive. Daines, Daines and Graham (1994:8) state that adults want to work but expect to achieve something as a result of the work. Qualifications will therefore be discussed briefly in the section below.

2.4.7   Qualifications in adult learning

In most educational fields, much attention is paid to qualifications that could be obtained. Educational needs are predominantly instrumental, and people would like to obtain skills and knowledge, rather than seeking an opinion to change their attitudes. They want to learn something because of its use and its significance regarding a job. Therefore, certain quality assessment standards are needed for educational programmes. People want to know what they can use a specific programme for though some people in the adult education field might view qualifications as wrong and inappropriate. In the eye of the learner, any qualification is very important. Many

people's self-esteem depends on their professional and social position in society. It is therefore important to ...*link the concept of quality in educational contexts to that of experiential learning. Consequently, quality depends on reaching a certain level of reflection and critical responsibility in educational processes* (Houben, 1992:139).

Socio-cultural education is concerned with adults signing up for courses in their general interest and during their leisure time. A variety of courses could be classified in this group, namely hobby-related, language, political, history, etc. These programmes are concerned with the person as a whole, with reference to his/her environment and the society in which he/she lives. Socio-cultural education is not specifically directed at vocational training. It strives to emancipate people, making them more aware and reflective of what is happening around them, to help enrich their lives. A programme succeeds when it manages to trigger a process that appeals to the learning participant as a whole, even though that person might not express any need to reflect on a particular issue (Houben, 1992:140).

Adult education is crucial if development is to take place. Many people consider economic development to be the backbone of a country and its strength. Training of possible entrepreneurs is therefore very important if economic development is to occur. This training should not exclude those people who have not received formal training, but should rather be aimed at targeting adults without formal training, to help them build a stronger support base for themselves and their families.

One method of applying adult education is through action research. This type of research entails is a systematic process, involving continuous cycles, where participants get the opportunity to identify their own needs. Programmes are then developed according to these needs.

2.5   Action research (AR)

Action research (AR) is becoming an increasingly popular movement in educational research. According to this type of research, educators (facilitators) are encouraged to reflect on their own practices to enhance the quality of education for the researcher and participants, which can be seen as self-reflective enquiry. AR is now being recognised by some experts as the best alternative to the traditional theory-based approach to educational research, as it bridges the gap between theory and practice of education (McNiff, 1997:1).

AR describes the characteristics of different research types, namely *action science* (AS), and *participatory action research* (PAR). PAR involves practitioners as both the subjects and core researchers. When those in question participate in the research process, causal interference about behaviour is more likely to be valid (Darling, 1998). Although AR and PAR do have slight

differences, they share many characteristics. During the past few years, many similar research processes were given different labels, causing some confusion (Whyte, 1991:7). PAR is an element of AR, making them almost identical.

Kurt Lewin is generally regarded as the father of AR. His main goal was to test ideas about changes in the social system (Darling, 1998). Lewin believed that the best way to move people forward was to engage them in enquiries and questions into their personal lives. According to Lewin, participation and democratic collaboration is necessary for this to happen. Lewin did not intend for his idea to be specifically used in the educational setting, but his ideas were adopted in the United States, focusing first on social issues and later on education (McNiff, 1997:22-24).

After a decade of the AR cycle being developed by Lewin, its use started to decline, mainly due to the technological boom, causing a separation between research and action, theory and practice. During the late 1980s, the AR movement gained momentum once again when it was picked up by Kemmis who based his ideas on that of Lewin, refining the concept. Kemmis focused specifically on education and, after joining forces with Wilf Carr, encouraged the use of the term *educational action research* (McNiff, 1997:24-26).

AR is a cyclical set of activities. Is a process of observation, reflection and action. After each set of activities, they are reviewed (looked at again), reflected on (reanalysed), and re-acted (the actions modified). It is not an orderly or neat activity, and these steps do not follow each other in a set chronological order. Once in practice, it could become a complex process (Darling, 1998; Stringer; 1996:17). This process involves reflection and a change in practice, linking self-evaluation and professional development (Winter, 1996:14). The cyclical process might not always run smoothly and there could be problems in tracing a clear connection between data sets, assumed causal relationships and implemented measures (Karlsen, 1991:155). According to Elden and Levin (1991:139) *reflection and action form a cyclic process that gradually improves knowledge and creates useful results. When we move from reflection and analysis into action and development, the insiders will usually lead the way.*

The AR cycle is based on the model in figure 4, following a consistent cycle of four stages, namely, to *plan, act, observe* and *reflect*. Once the first cycle is completed, the second cycle starts. The cycle itself can start at any stage, either during planning, action, observation or reflection. *Planning* in AR is a constructive process which arises during discussion with all stakeholders. During *action*, the plan is put into place with the hope of improvement in the social situation. During *observation*, AR can be seen as the research portion where the changes are observed for their effect and the context of the situation. During *reflection* the stakeholders examine, construct and re-evaluate their concerns. Many practitioners prefer to start their cycles with the reflection stage, moving from there to the next cycle (Seymour-Rolls & Hughes, 1995).
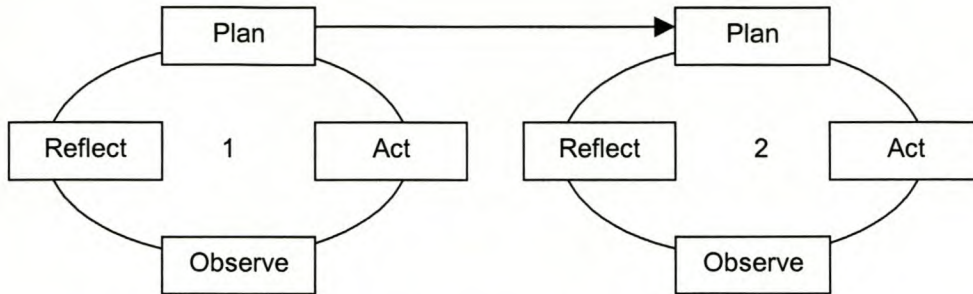
Figure 4: Zuber-Skerrit's four-moment action research model (Hodgkinson & Maree, 1998:56)

Making use of a cyclical process will assist in enhancing responsiveness from participants, which will help to achieve both action and research outcomes. The cyclical process is important, as it provides the opportunity to learn from experience, providing reflection on processes and outcomes, intended and unintended. If each step in the cycle is preceded by planning and followed by review, the researcher and learner will learn more (Dick, 2000). It is therefore important that AR should promote participation of all stakeholders in the process. The commitment and agreement of stakeholders affected by the AR process, will help determine its success. The success of the research is accomplished by directly involving all stakeholders in the research process as equal partners.

Most AR that occurs, is qualitative by nature. In field settings where AR research is used, numbers do not easily apply to some features of the study. To develop a suitable quantitative measure is often time-consuming and difficult, making it more time-efficient to make use of qualitative data (Dick, 2000). Qualitative data is predominantly used when dealing with languages, not numbers. It is easier to work in the natural language of the participants, as the process becomes more accessible to them. Dealing with qualitative data makes AR more responsive and flexible, responding to the emerging needs of a changing situation. Quantitative measures can sometimes be difficult to use and time-consuming.

Karlsen (1991:150) has developed his own model of the steps in an AR process, as shown in figure 5. There are five different phases in Karlsen's model. Step one and two can be seen as step one of Zuber-Skerrit (planning stage). The feedback systems lead back towards new solutions and knowledge, which would then once more be used to formulate an approach to a new problem. There could therefore possibly be another link from the solutions and knowledge leading to step one.
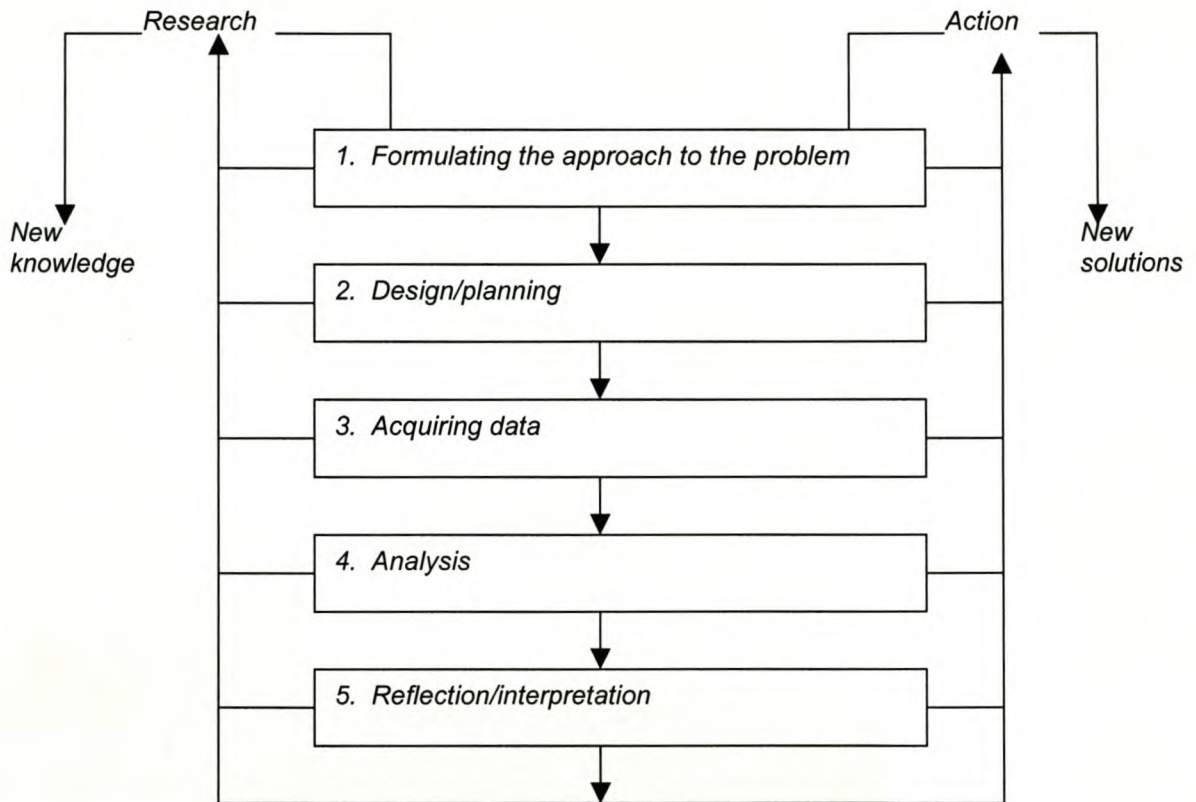
Figure 5: Steps in an action process (Karlsen, 1991:150)

AR forms a link between the practice and analysis of the practice into a continuous developing sequence, linking the researcher and participants into a single community of interested colleagues (Winter, 1996:13-14). The term *action research* should not be used for a type of personal learning which does not lead to public dissemination or publication of credible results. AR is a systematic process which creates public knowledge by means of action and reflection (Hughes, 2001).

Elden and Levin (1991:132) refer to the participants as *insiders*. They are the experts in their own setting and situation. They have acquired how things operate from personal experience, and have gained knowledge concerning attitudes and values. Their knowledge is highly individual, with the main aim to solve practical problems and to achieve personal goals.

Whereas the participants are seen as insiders, Elden and Levin (1991:132) refer to the researchers as *outsiders*. Researchers are not the experts regarding the situation, but they

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provide other aspects like training and analysing. They have the ability to create new knowledge, irrespective of its contents. They should possess a high level of interpersonal skills and should have the ability to design and manage learning events.

There is a growing and evolving group of approaches and methods continuously being invented and rediscovered, all known by slightly different terms (Chambers, 1998:108). These terms seem to be similar, but each has its own unique characteristic (which distinguish one from the other). Three of the most common methods are RRA (*Rapid rural appraisal*), PRA (*Participatory rural appraisal*), and PAR (*Participatory action research*), with the latter being one of the most popular methods to use during adult educational research. A table of comparisons between these three has been put together to highlight the most predominant characteristics of each.

Table 5 sets out the major differences (regarding characteristics, dangers and principles) between three concepts of participatory appraisal methods. Participatory action research (PAR) will be discussed in more detail following this table.

Table 5: Differences between RRA, PRA and PAR

	RRA (*Rapid rural appraisal*)	PRA (*Participatory rural appraisal*)	PAR (*Participatory action research*)
Characteristics	▪ Quick, economical research ▪ Externally-driven process ▪ Restricted participation ▪ Economical method for outsider to learn	▪ Promote empowerment ▪ Build respect ▪ Promote localisation ▪ Inclusiveness ▪ Use feedback from community participation	▪ Empower local community ▪ Participation is important ▪ Knowledge ownership is important ▪ Do follow-up activities to produce durable change
Dangers and/or problems	▪ Who owns the product? ▪ What is the value added? ▪ No feedback from community	▪ Hijacking – project is externally-driven ▪ Formalism – abrupt and exploitative approach ▪ Disappointment – raises community expectations	▪ Must understand local power structures and issues ▪ External agent should be aware of potential damage to self and community ▪ External agency has clear status and good relationship with community
Shared principles	▪ Offsetting biases ▪ Rapid progressive learning ▪ Optimal ignorance and appropriate imprecision ▪ Triangulation ▪ Direct contact ▪ Seeking diversity and differences		
Extra principles of PRA		▪ Culture of sharing ▪ Critical self-awareness ▪ Changing behaviour and attitude ▪ Commitment to equity	

(Chambers, 1998:6-7, RRA website, PRA website, PAR website)

Before PRA became a popular method during the late 1980s, RRA was used. PRA evolved as a result of the search for cost-effective assessment of information. The need arose for timely and good information and insights regarding rural areas experiencing accelerated change. PRA emphasised the importance of relevance of situational local knowledge and getting the bigger picture right, not concentrating on statistical accuracy (Chambers, 1998:6; RRA website).

PRA came into being during the late 1980s as a response to conventional developmental research methods. PRA consists of the researcher together with the members of the community, who interact with each other through workshops and newsletters. The general focus of PRA is on the small-scale intensive case study, with a major focus on experience, with features of participant observation methods (Stadler, 1995:805-806, 810).

2.5.1 Participatory action research (PAR)

Elden and Levin (1991:131) define PAR as ...*a way of learning how to explain a particular social world by working with the people who live in it to construct, test, and improve theories about it so they can better control it.* PAR is therefore seen as a process where those people in a community who are being studied, actively participate with the researcher during the process, from the initial design right through to the discussion of the results that had been gathered (Karlsen, 1991:147). As Stringer (1996:7) states, uninvolved researchers will be inadequate in and of themselves by just recording the events and formulating explanations. To be involved in the process, is very important. Flood (1998:137) goes one step further by saying that "self-reliant" PAR is meant for disadvantaged society members. The idea is to ...*first stimulate awareness of the capacity to transform the relations of knowledge as a priority....* This process generally involves overturning the top-down forms of knowledge relationships.

Even though many people would like to think that the "one-size-fits-all" solution could be applied to situations which are similar, PAR has proved that this is not possible. When working in a local context, each problem in this area would have its own unique solution. It is not possible to make use of a generalised solution; therefore, enquiry into the problem should be decentralised to its local context (Stringer, 1996:x).

PAR's greatest asset is its contribution to the explanation of a social world by working with those living in it, constructing, testing and improving theories on how they can exercise more control over the world. PAR can therefore primarily be seen as a learning strategy to empower the participants, and secondly as producing research (Elden & Levin, 1991:131). A predominant driving force behind PAR is its strive to create social change. It embraces principles of empowerment,

participation, reflection and group emancipation to improve people's social situation (Seymour-Rolls & Hughes, 1995).

An important aim of participation is that people are given the opportunity to control their own decision-making process in research and development planning. Many think that this helps to promote the sustainability of development projects. Participants get the opportunity to achieve a sense of ownership and responsibility over the project (Stadler, 1995:810). According to Whyte (1991:9)...*key informants thus become active participants in the research*. Following this, we could say that passive participation does not exist in AR. People participate in the decision-making process, but it does not mean that they need to have the same input or the same interests. They will have different wants and needs and different amounts of resources and time to contribute (Hughes, 2001). Karlsen (1991:149) highlighted several criteria for the participation-oriented research process:

- the participant's degree of involvement should be open to dialogue and negotiation;
- all those participating should contribute towards creative thinking, being part of the research process, and
- participation should aim to be genuinely co-operation-orientated.

It should be kept in mind that any PAR cycle would continue until the group is satisfied with the outcomes. It is also a realistic possibility that a project might not come to an end, but this does not mean that the original problem has remained constant, or that the participants never found social justice in their situation (Seymour-Rolls & Hughes, 1995).

Participation plays an important role, as it leads to a sounder agreement for change. It also tends to promote ongoing adjustments and reinvention because of the greater overlap of populations involved in the innovations (Walton & Gaffney, 1991:125). Successful action outcomes need to be backed by those who are most affected by it. To ensure that people are committed to participation, those affected should be involved, contributing to the ethical side of the participative methods (Dick, 2000). All relevant stakeholders should be included in the process of investigation. Diverse groups are given the opportunity to negotiate their various agendas in an atmosphere where there is mutual trust and acceptance and where the groups work together to find effective solutions to the problems (Stringer; 1996:35).

Stringer (1996:29-30) highlights the four fundamental conditions for the ideal communication situation, namely understanding, truth, sincerity and appropriateness. Communication among people tends to have a significant impact on their ability to work together effectively. It also has a direct effect on feelings of well-being and it could either enhance the efficacy of the individual's work, or detract from it. Participants should use communication that would enhance harmonious relationships and the effective attainment of group and organisational objectives.

PAR was designed to allow repressed individuals and groups and those that have been excluded from decision-making processes, to be heard. It involves practitioners in the research process, from the initial design, to data gathering and analysis, to the final conclusion and those actions in response to the research (Whyte, 1991:7).

In recent years, there has been a notable shift in the focus of rural development strategies, moving from the dictatorial "top-down" approach to the more locally-based and democratic "bottom-up" strategies. One of the key features of these strategies is the holistic outlook it has, with interaction between different elements in people and environmental relationships taken into consideration (Motteux, Binns, Nel & Rowntree, 1999:262). Against the background Shepherd (1998:203) maintains that *"Allowing people to decide how they will manage their environments requires an ability to facilitate that process, not to dictate the nature of activities which will constitute the management process".*

Empowerment for development has been highlighted by Motteux *et al.* (1999:261) by making use of the PRA method. In recent years the PRA method has come to enjoy widespread recognition amongst development agencies and individuals. It is a participatory method that seeks to gain knowledge and to catalyse development and empowerment through community sensitive approaches. Rural development participation's primary concern is not involvement or inclusion of the rural poor in a project, but it concerns itself with organisational development where the people can voice their interests, defend their possessions, and discover new possible development areas. Although rural organisations are generally small (mostly a few individuals only), they should be linked with other networks and associations (Shepherd, 1998:204).

2.6   Empowerment

South Africa has seen many developmental changes during the last few decades, from the fall of the apartheid regime to the acknowledgement of human rights, especially those of women. According to Kotzé (s.a.:211) empowerment has played a significant role in South Africa's transformation process since the 1990s (in economical and psychological terms). The empowerment of especially women provides the opportunity to challenge the power of others, if it is seen as illegitimate, and to be able to resolve a situation in their favour (Dixon-Mueller, s.a:12). Together with this, the government has reached the stage where development and training are considered to be the cornerstones for an empowerment programme (Government Gazette, 1997:60).

The South African government has given their own definition of empowerment relating directly to *Women's empowerment and gender equality.* This document *...refers to the process of*

'conscientisation' which builds critical analytical skills for an individual to gain self-confidence in order to take control of her or his life (South Africa's national gender policy framework for women's empowerment and gender equality, 2000:xvii). Individuals therefore develop their beliefs and attitudes about their ability to take action, they develop their self-worth and self-confidence and increase their coping skills (Albertyn, 1995:17).

It is difficult to define the term *empowerment*, and it should therefore be examined in the context where it is used. The context could vary, and could have a political or socio-cultural purpose. Terms generally associated with empowerment are *control, self-strength, ability to fight for one's own rights, self-reliance, self-power* – to name only a few. All these terms are embedded in local value and belief systems (World Bank Report, 2001b:10). Many people have an idea of the meaning and origins of empowerment, but it seems that no one has been able to pinpoint its true description. According to Suojanen (1998:85), there is no universal definition for *empowerment*, but to *empower* means to *permit, enable* or *allow*. Empowerment could be self-initiated or initiated by others. Dixon-Mueller (s.a:11) states that the concept of *empowerment* is multi-dimensional, and operates at many levels.

A full definition of *empowerment* should include and consider psychological, economic, and cognitive components. Psychological components include feelings to improve one's conditions, with the belief that one can succeed in the efforts employed. The economic component includes people's ability to take part in a productive activity which will allow some financial independence. The cognitive component entails an understanding of the conditions of subordination and the reasons behind them (Stromquist, 1988:13). As Stromquist (1988:12) puts it, *"Empowerment seeks to combine both consciousness-raising and participation so that individuals not only understand their society and the place they currently have in it, but that they undertake efforts to modify social relations".*

When individuals are powerless, they do not have the ability to manage their own lives. They do not have interpersonal power to influence others, and it is hard for them to function effectively on a social level. They become more dependent on others, more powerful individuals. Characteristics of non-empowered people are dependency, distrust, pessimism, powerlessness, self-blame and hopelessness. From this, it is clear that empowerment is vital if individuals are to develop, as it influences their own lives as well as those of the people around them.

2.6.1 Three empowerment levels

Empowerment could occur on three levels, namely the micro-, interface and macro-level. The micro-level (personal power) concerns the way individuals feel about themselves (self-esteem, self-concept, dignity). On the interface level (interpersonal power), *empowerment* refers to the

relationship immediately surrounding the individual (family, social groups). On the macro-level (political power) the focus is on critical reflection of issues which have an effect on the community and the political target group. For empowerment to be effective, it should take place on all three levels (Albertyn 2001:20-21). Empowerment does not necessarily fit into these three levels exclusively. It could occur at various levels at the same time, which makes it important to concentrate on all three levels simultaneously (Albertyn, 1995:58). The three levels are summarised in table 6.

Table 6: Different levels of empowerment

LEVEL	REFERS TO:	EXAMPLES
MICRO-(personal power)	The way someone feels about him-/herself	Self-esteem, dignity, self-efficacy, self-confidence, self-concept, coping skills, leadership, personal responsibility
INTERFACE (interpersonal power)	Immediate surroundings	Family, social group, mutual respect and support, caring, individual assertiveness, problem-solving, decision-making
MACRO-(political power)	Critical reflection	Participation to bring about change, awareness of rights

(Albertyn, 2001: 20-21)

Dixon-Mueller (s.a:17-18) has also identified three levels of empowerment, which coincides with that of Albertyn, as indicated above. Dixon-Mueller (s.a:17) refers to them as the decision-making environments, which range from the immediate interpersonal interactions, to the intermediate context of family and community influences, to aspects of the state. At each of these three levels, environmental elements could empower or disempower and influence demographic processes. Questions could be asked at each level, regarding the distribution of potentially empowering social and material resources.

Empowerment could take place on an individual basis, as well as in a group (collectively). Table 7 shows the product of the empowerment processes, which is evidence that empowerment has indeed taken place.

Table 7: Personal and collective empowerment

Personal empowerment	Collective empowerment
Self-confidence	Group identity
Self-esteem	Group dignity
Sense of agency	Collective sense of agency
Sense of 'self' in wider context	Self-organisation and management
Dignity	

(Rowlands, 1998:23)

Empowerment takes place where participants have been taught how to deal with their current situations by applying skills of self-enquiry, critical thinking and self-actualisation, which help them to take control of their lives (Albertyn, 2001:21). Rahman (1990:44) says that *The process of **empowering and enabling** the people to articulate and assert, by words and by deeds, their ideas and thinking in this regard, must be one of the core dimensions of social development itself.* It should be kept in mind that an enabling environment might not always be of help in the empowerment process, but empowerment cannot occur without these enabling conditions (Dixon-Mueller, s. a:19).

Kotzé (s.a:215-216) compiled five criteria for empowerment programmes to be successful:

- sustainable resources (a degree of financial independence should be developed to prevent total dependency on external donors and funding agencies);
- planning (in terms of criterion it might be necessary to approach external business consultants to assist with the setting up of plans for finances, goals, objectives, and to do a situational analysis);
- community support (all stakeholders in any programme should be identified and a thorough analysis should be done of their needs. For any programme to be successful, community support needs to be visible);
- target group needs (these need to be established at the start of each programme. A thorough assessment of the training needs of the target group should be conducted), and
- training courses (the nature of these courses should be developed that are applicable to the environment in which they are taking place, and they should be suited to the adult learners in the group).

Besides the criteria of empowerment programmes, four elements are discussed in the World Bank Report, (2001b:14-17), namely access to information, inclusion and participation, accountability, and local organisational capacity. These four elements are seen as success factors that could assist with the empowerment of poor people, to increase their freedom and choice and action in different contexts.

- *Access to information*

Availability of information is a gateway to power, as informed people are better equipped to take advantage of opportunities, exercise their rights, negotiate effectively, and have better access to services. Without information, people cannot take effective action against their positions (i.e. poverty).

- *Inclusion and participation*

Inclusion of the previously disadvantaged is critical in order to ensure that limited public resources build on the local knowledge and properties of the people involved. Participation can be direct, representational, political, information-based, or based on competitive market mechanisms.

- *Accountability*

This is the ability to call on public officials, employers or service providers to get them to answer to their stated policies and to hold them accountable for their actions. This will aid in decreasing the corruption factor amongst officials and employers.

- *Local organisational capacity*

Groups and communities manage to organise resources to take care of themselves, without the help of the formal government support system. Community members support one another to help solve problems. Once communities get organised, they have a better chance of being heard and there is a bigger possibility of their demands being met than those of communities with little organisation and structure.

Community development is very dependent on empowerment and voluntary participation. Development agencies therefore need to take more notice of local knowledge and the disempowered state of many communities (Motteux *et al.,* 1999:271).

2.6.2   Empowerment evaluation

As it is hard to characterise and define empowerment, it is difficult to predict entirely the outcome or effect that a project might have. When monitoring empowerment, it is not just the results that are of importance, but also the comprehension of the processes (which are qualitative). Empowerment processes unfold throughout the life of the project and should continue once the project has ended (Oakley, 1988:5). In the broadest sense, *empowerment* comprises the expansion of freedom of choice and action, and increasing the control and authority over decision and resources that will have an effect on one's life. When exercising real choice, increased control over lives are gained (World Bank Report, 2001b:11).

A definite link is possible between participatory evaluation and empowerment (Marsden & Oakley, 1990:45). The foundation of empowerment evaluation is self-determination, including the ability to

identify needs, to establish goals and to plan action in order to achieve these goals (Fetterman, s.a:6). During empowerment evaluation, participants get the opportunity to assess their progress towards self-determined goals, reshaping their strategies according to their assessment (Fetterman, s.a:3).

Empowerment evaluation involves local communities, helping to empower them by using self-evaluations and internal evaluations. It is a collaborative exercise between the local community and the external evaluator, with the dual purpose of assisting the participants in conceptualisation and reflection on a wide range of perspectives and ideas, and structuring the process of evaluation itself (Dale, 1998:81-82). The outside evaluator takes on the role of a coach, helping the participants to conduct their own evaluation. The facilitator should act as a support base for the participants as participants can only empower themselves (Fetterman, s.a:3).

Empowerment evaluation is a method which is strongly influenced by and is similar to participatory evaluation action research. Both are characterised by concrete, targeted, timely, pragmatic orientations towards programme involvement. Both utilise reflection and action cycles with the focus on the simplest data collection techniques (Fetterman, s.a:4; Feuerstein, 1988:18).

Fetterman (s.a:7-9) identified five developmental stages of empowerment evaluation, namely;
- *Training*

Facilitators guide participants to conduct their own evaluations as an integral part of programme planning, thereby becoming more self-sufficient. If participants conduct evaluation, it becomes an ongoing process, even if the facilitator leaves.
- *Facilitation*

The facilitator will help others conduct their self-evaluation. A role of the facilitator is to clear away obstacles that might hinder the participants when participating in this evaluation process. Another role of the facilitator involves clarification of any miscommunication that might exist between participants and facilitator.
- *Advocacy*

Participants could collect data on their own performance and present it to the facilitator. This would then be an individual self-evaluation process.
- *Illumination*

It is an eye-opening, enlightening experience, as participants gain new insight and understanding about structures and programme dynamics.
- *Liberation*

Powerful emancipator forces are exposed for self-determination. People are able to free themselves from roles and constraints.

Fetterman (2000:2-3) has also highlighted three steps regarding empowerment evaluation. The first is to *establish a mission or vision statement* about a programme, or as otherwise known, to focus on results. Participants state what they would like to see and specify the activities required to achieve the processes and outcomes. The second step is *taking stock.* This involves identifying and prioritising programme activities, which helps to determine where the programme stands, including its weaknesses and strengths. Thirdly is *charting a course for the future.* Strategies and goals are established to help participants achieve their dreams. The goals also help the stakeholders to determine their path for the future, whereas the strategies help them accomplish these goals.

2.6.3   Evaluation of programmes

Several purposes of evaluation which can be applied during programme development have been highlighted by Russell (1982:285-286). Firstly, a purpose of evaluation is to determine whether the programme is indeed meeting its objectives, and also to determine whether the objectives were appropriate for the programme. Secondly, an equally important purpose is to combine a systematic method with subjective indicators to gain useful understanding of the worth of a programme. Historically, many programmes were evaluated from a subjective viewpoint only, where facilitators often measured programme success by 'feeling' that participants were or were not enjoying themselves, which was based purely on assumption. A third fundamental purpose is that a systematic procedure method needs to be developed to produce accurate and reliable knowledge. Comprehensive evidence of the programme's ability to achieve its intended objectives has to be provided. Fourthly, evaluation occurs to aid in decision-making, where it helps the planner to decide on the possible future of the programme. Fifthly, evaluation increases the professional knowledge base to improve current practices. Old concepts, invalid ideas, and misunderstandings can be replaced after meaningful evaluation.

Any programme that takes place should undergo some form of evaluation, whether it is formative and/or summative. Evaluation is a crucial step if the researcher wants to determine whether a programme has been successful or not, and what, if any, the changes are that should be incorporated into the programme. The following section will focus on monitoring and evaluation practices of programmes. Besides empowerment evaluation taking place, other aspects of a programme should also be evaluated. Several aspects that could be assessed by means of adult education programmes are the needs identification that takes place, the research method that is followed (in this case PAR) and the evaluation of the programme itself.

2.7   Monitoring and evaluation

Monitoring and evaluation are necessary in every programme that is planned and carried out. Without it, no programme would be able to function effectively and efficiently, as it would be impossible to determine what effect the programme had on those people or aspects involved in it. The importance of monitoring and evaluation cannot be stressed enough, and any stakeholder that is therefore considering the implementation of a programme, should make use of some form of evaluation if some level of success is to be achieved.

Some of the different aspects which will be considered in the next section, include different approaches to programme evaluation, the evaluation of data, some of the measuring instruments used, problems of evaluation, the choice of indicators, and community and participatory approaches to evaluation.

Evaluation is required to improve or change programmes, to make decisions concerning the programme or those affected by it, and to construct plans to examine the programme and its effects (Grotelueschen, Gooler & Knox, 1976:21). Programmes should be under constant review, and should be refined on the basis of data obtained by careful and systematic monitoring. This is the only way to ensure that monitoring and evaluation remains a dynamic process, maintaining its applicability to the needs for which is was designed (Murhpy, 1989:457).

Russell (1982:284) proposes a definition for evaluation to be used in programme planning, namely, *"Evaluation is a continuing, ongoing function whereby pertinent information is gathered in order to assess the efficiency of program conduct and content and the effect of the program on the participant; this information is then used to determine the adequacy of the program in reaching its stated objectives so that future program decisions may be made wisely".*

During the 1960s and 1970s, projects were seen by many as the main aspect of development, for which methodologies for project appraisal and monitoring had to be created. In the early 1980s, the monitoring and evaluation of these developmental projects started receiving attention. It was argued that timely studies of the project's progress could provide facilitators with the skills to make more effective decisions utilising techniques, while studies of completed projects could provide feedback, using evaluation methods (Abbot & Guijt, 1998:13). Collecting good information is crucial, and caution should be taken regarding the cost and time involved in the process. Data should never be collected if the analysis has not been planned, or if its purpose is not clear. Collecting data should therefore be as simple as possible (RDS, 1995).

The importance of evaluation in judging the effectiveness of any programme taking place should be an integral part of any decision-making process, so as to help refine educational programmes

while they occur. Any educational programme should be a dynamic activity, and new and improved ways of implementation should be constantly explored. When making any programme-related decision, it is important to have the necessary knowledge regarding the situation that might influence the decision. A well conducted, focused investigation, done by groups and individuals who understand what they are participating in, can have a major impact on the decision-making ability concerning the programme (Owen, 1999:2).

Any evaluation process should be educational, and should therefore involve individual and collective learning. All participants should have the opportunity to learn from one another about their strengths and weaknesses, and how they might improve their programmes. Involvement in the process and the outcomes provide learning and insights (Tandon, 1988, quoted by Burke, 1998:46).

In this study, formative evaluation will be used during the projects as far as monitoring is concerned. This takes place as a routine collection and analysis of and reporting of information regarding the performance of the work which has taken place, which corresponds with the literature according to Dale (1998:28).

There are several views on evaluation. A core factor towards social science evaluation is the increase in recognition that societal development occurs through complex processes which involve numerous actors and factors, making it possible that only bits and pieces of the reality might be investigated in an objective manner and through standardised procedures. Several main features are that subjectivity should be recognised, as it is not always possible to give a true account of what happens. The interpretations of different stakeholders could also differ. Evaluation could be an empowering process, where beneficiaries learn to analyse changes which might affect their lives. Quantitative indicators rarely provide adequate insight, and qualitative indicators are therefore crucial to understand changing processes. It is therefore necessary to make a move to use less rigid and formal study methods, like semi-structured interviews (Dale, 1998:34).

Evaluation needs to adapt to the changes in its environment to prevent it from becoming blocked by other developments and so becoming extinct. Participation, collaboration and empowerment are not recommendations anymore, they are requirements in any developmental programme (Fetterman, s.a:18).

2.7.1   Evaluation approaches

Two types of evaluation approaches are identified, namely *formative evaluation*, also known as monitoring, and *summative evaluation*.

2.7.1.1 Formative evaluation

This type of evaluation is a main component in the decision-making process, helping to refine programmes and to bring about corrections (Murphy, 1989:457). The main purpose of promoting learning can only occur when it is known why certain things happen the way they do (Dale, 1998:51). This type of evaluation should therefore take place on a regular basis during the conducting of a programme. F*ormative evaluation* could be defined as...*a more thorough examination, at specified points in time, of programme or projects or parts of them, usually with emphasis on impacts and additionally commonly of efficiency, effectiveness, relevance, replicability and sustainability* (Dale, 1998:29).

Formative evaluation comprises the assessment of different components of a programme and their functioning during different stages of a programme. These components include aspects of design, preparation and implementation together with the learning outcomes. To attain the final objectives, continuous monitoring should occur so that problems can be sorted out as soon as they are recognised, and not only once the programme is completed (Dale, 1998:30-31; Murphy, 1989:457).

Good and thorough monitoring is very important in any programme if the data and information necessary to evaluate the performance should be collected. If a programme has not been adequately monitored over a certain period, it is impossible to evaluate the programme (Oakley, 1988:7). Monitoring is important to keep track of the project's progress, to gather feedback as to whether objectives are being met, and to give information regarding possible changes that might have to be made. This information should be action-orientated, timely, relevant and accurate (Oakley, 1988:8).

Monitoring takes place to help and support decision-making and planning by presenting information on changes and trends (Abbot & Guijt, 1998:14). Even though the results are important, the comprehension of the processes which are qualitative, are too (Oakley, 1988:5). Dale (1998:29) sees monitoring as a sub-category of evaluation, covering issues like finance and quality, and current assessment of direct results. He defines *monitoring* as *Frequent largely routinewise collection and analysis of and reporting on information about the performance of the work in a programme or project, comparison of this with the programme or project plans, and connected discussions about and proposals for any corrective action* (Dale, 1998:28). With project monitoring, it is vital to keep track of the progress and to receive feedback. Continuous monitoring should recommend appropriate actions to take place once analysis has taken place. Programmes should ideally be under constant review and should be streamlined to maintain their applicability in terms of those needs which were assigned to them (Murphy, 1989:456).

Russell (1982:288) refers to *process evaluation* which indicates similar characteristics of monitoring and formative evaluation. It occurs during programme development and implementation to allow for improvement of the programme during the developing stages. It also allows the planner to make decisions about the conduct of the programme and the potential for obtaining objectives.

2.7.1.2 Summative evaluation

This type of evaluation takes place once the programme has been completed, to judge the value of a programme and its design and management, and whether the programme objectives have been met. The basic aim of this type of evaluation is to provide guidelines which could be implemented in similar or other development programmes, and it is therefore a determining factor in deciding whether a programme should be allowed to continue, or whether it should be terminated. Summative evaluation is generally carried out by a person who is not in any way involved in the programme (Dale, 1998:32; Scriven, quoted by Murphy, 1989:457).

Russell (1982:288) suggests a different term, namely *outcome evaluation*, which shows similar characteristics to that of summative evaluation. Outcome evaluation is also used once a programme has been completed. The purpose of outcome evaluation is to provide information concerning the programme's overall effectiveness and efficiency when measured against the stated objectives.

Monitoring and evaluation (formative and summative) are very important aspects of any rural development project. It is crucial to understand the results, and the ability to measure the project if it is making progress once it has accomplished its goals and objectives (Oakley, 1988:3).

Several differences have been highlighted between monitoring and evaluation, as shown in table 8.

Table 8: Comparison between monitoring and evaluation

	MONITORING	EVALUATION
Differences	• Periodic assessment of indicators • Frequent occurrence • Guided by pre-determined indicators • Collect information that feeds into evaluation regularly • Assess trends • Provide a basis for evaluation exercises	• Once-off assessment of indicators • Sporadic • Based on general questions or data assessment • Judge the value of a situation and its intervention • Does not always build monitoring data (if not available)
Similarities	Monitoring and evaluation both – • compare "before-and-after" results • need a baseline of information to proceed • have specific objectives • identify relevant information • identify end-user of information • indicate how data should be collected, analysed and interpreted • give an indication as to who should be involved in each phase	

(Abbot & Guijt, 1998:13-14).

Even though summative and formative evaluation fall into the same category as monitoring and evaluation, they have distinguishing characteristics, which are summarised in table 9 below.

Table 9: Differences between formative and summative evaluation

FORMATIVE	SUMMATIVE
• exploratory research method • flexible design • focuses on individual programmes • identifies influential variables • uses locally developed instruments • relies on observation and informal data collection	• well-defined evaluation designs • unobstructive method • comparative data • concerned with broad-range issues • publicly accepted • reliable data • reflects sponsor's concerns

(Allin, s.a., quoted by Murphy, 1989:457)

In any programme evaluation, it is just as important to evaluate the participants who took part, to determine whether the knowledge they had acquired, is being applied in a useful and effective manner. Caffarella (1994:136) indicates that evaluating the participants' learning gives the researcher an idea as to possible changes in participant's knowledge, skill level and attitudes.

2.7.2   Data evaluation

Two types of data can be generated from programme evaluation, namely *quantitative data* and *quantitative data*.   *Quantitative data* is purely numerical, whereas *qualitative data* provides rich descriptions of situations (Caffarella, 1994:136).   These two types will now be discussed in more detail.

2.7.2.1 Quantitative evaluation

Quantitative evaluation makes use of a range of methods which use measurements to investigate and record different aspects of social reality (Bless & Higson-Smith, 2000:156).   Quantification makes any observation more explicit, thereby making it easier to aggregate and summarise the data. It also opens up the possibility of statistical analysis (Babbie, 1998:37).

One of the dangers in using quantitative data in social development evaluation, can be stated as follows, *"Numbers can become ends in themselves, rather than means to an end..."* (Marsden & Oakley, 1990:8).   This indicates that whereas the social factors are not considered as important, the figures relating to the study are of crucial importance.   Figures relating to the study cannot always be used accurately to judge social outcomes and their effectiveness.   In qualitative evaluation, it is important to understand the processes which unfold throughout the life of a project (Oakley, 1988:5).

Quantitative research is considered by many researchers to be objective, reliable, and geared towards producing outcomes which can be generalised across different contexts. Machpherson, Brooker and Ainsworth (2000:50) see qualitative methods as subjective, ambiguous, placing more emphasis of the localised context, and being less concrete.

Even though there is a strong support base for the use of quantitative methods, problems do exist in its use. The information received is often clouded and unclear due to the complexity of the methods used. Sample sizes might be too big, and it might be hard to interpret and understand the results produced (Van Maanen, 1982, quoted by Naslund, 2002:324).

It must be kept in mind that "Qualitative and quantitative measures are not mutually exclusive, and should co-exist in the evaluation process" (Garaycochea, 1990:69).   They should therefore be used in conjunction with one another to ensure reliable and valid measurement outcomes. These two methods should be fused together as a multi-method procedure (Macpherson, Brooker & Ainsworth, 2000: 53).

2.7.2.2 Qualitative evaluation

Qualitative implies an emphasis on meanings and processes. In the case of this type of evaluation there is an increased possibility for rich descriptions and a sensitivity for meanings and the ideas of participants involved (Alvesson, 1996, quoted by Naslund, 2002:328).

Qualitative data is gathered by making use of a wide range of methods, using qualifying words and descriptions to investigate and record different aspects of social reality (Bless & Higson-Smith, 2000:156). This type of data is generated mostly by field research, where observations are not easily reduced to numbers. Field research takes place during observation of or participation in social behaviour (Babbie, 1998:280). Researchers making use of qualitative methods can get closer to participants by using detailed interviews and close observations. These researchers confront the constraints of everyday life. The rich descriptions received are valuable in the research (Naslund, 2002:328).

It would be almost impossible to evaluate the rate of participation based on numerical data, as it would provide insufficient information. With participation, it is necessary to measure and judge the qualitative change that has taken place (Oakley, 1988:4). It can be said that *...quantification of such effects is merely the tip of the iceberg which hides a whole range of unforeseen and non-material consequences of rural development projects* (Oakley, 1988:5). It is, therefore, the ideal of qualitative research is to move from interpretation and analysis into action, involving all stakeholders as collaborative, pro-active partners (Macpherson, Brooker & Ainsworth, 2000:51).

A degree of uncertainty exists when using qualitative research, as the richness of the data may produce obstacles hampering interpretation, compared to the simple testing of quantitative research (Macpherson, Brooker & Ainsworth, 2000:53). Putting this uncertainty aside, qualitative evaluation is more concerned with describing the properties and characteristics of a process over a certain period. The data is then interpreted to make statements concerning the nature and processes that have taken place (Garaycochea, 1990:69).

A different approach to monitoring and evaluation needs to be followed, which is not based exclusively on measuring material effects, but which can explain the aspects of rural development projects that promote participation. Such an approach should be concerned with description and interpretation of the project's activities, using a broader and qualitative approach (Oakley, 1988:5-6).

Oakley (1988:32) has set out a number of principles that should be taken into account when making use of qualitative evaluation. Evaluation of social development projects should be qualitative and quantitative to understand the outcomes fully. It should also be a dynamic process. Monitoring is of prime importance, and qualitative evaluation should be a participative process.

Monitoring and evaluation take place by making use of a variety of measuring instruments. It is suggested that more than one type of data measurement technique should be used in research study to ensure reliability of the data. Case studies as a measuring instrument will be discussed in the next section.

2.7.3 Outcomes measurement of a programme

Outcomes are the benefits of change for the individual or community during or after their participation in a programme. Participants are influenced by the outputs of the programme. These outputs are the direct products of the programme activities. Outcomes are related to skills, knowledge, value, condition, behaviour or other attributes. One such desired outcome of a programme could be the individual's ability to develop a budget, increasing his/her financial stability (Outcomes measurement resource network, 1996a).

A model has been compiled in the United States of America, Measuring Program (Outcomes measurement resource network, 1996b), indicating the inputs, activities and outputs which take place to reach the outcomes of a programme. This model is represented in figure 6.

INPUTS	ACTIVITIES	OUTPUTS	OUTCOMES
Resources dedicated to or consumed by the programme.	What the programme does with the inputs to fulfil its mission.	The direct products of programme activities.	Benefits for participants during and after programme activities.
Eg. money, staff, time, facilities, equipment and supplies	Eg. food, shelter, job training, counselling, educating the public	Eg. number of classes taught, hours of service, number of participants	Eg. new knowledge, increased skills, changed attitudes Modified behaviour Improved conditions Altered status

Figure 6: Programme outcome model (Outcomes measurement resource network, 1996b)

2.7.4 Measuring instruments and methods

The measuring instrument that is used during research should be reliable (measurements should be consistent and dependable), valid (the instruments should measure what it claims to measure), and objective (producing an unbiased quality in the measurement of instruments). These are

critical minimal requirements to ensure that information is useful, dependable and unbiased. If these qualities are not present, little faith can be put in the results based on such data. All measurements must be appropriate, measuring important factors reflected by the programme objectives, and it should be appropriate to the participants being evaluated (Russell, 1982:305).

One qualitative measuring instrument, namely case studies, will be discussed in more detail.

2.7.4.1 Case studies

A case study is an empirical enquiry that investigates a contemporary phenomenon within a real-life context, where the boundaries between the context and phenomenon are not clear, and where a multiple source of evidence will be used (Yin, 1984:23).

A case study could be a challenging research instrument to conduct, as the researcher has to shift the investigation from a descriptive account, to research that has valid meaning and which can be used and applied in a scientific manner. Besides this challenge, case studies are widely used, as it can offer insights that might not be attainable by means of other research methods (Rowley, 2002:16).

Although there are several ways to conduct social science research, Yin (1984:13) states that case studies are preferred when "how" or "why" questions need answers, when researchers having little control over an event, or focusing on real-life events. A case study is usually qualitative by nature, and generally provides readers with an in-depth description of a small number of cases (Mouton, 2001:149). It depicts a holistic portrayal of the experience of one person and the results regarding a programme (McNamara, 1999b), and emphasises a detailed contextual analysis of a limited number of conditions or events and the relationship between them (Soy, 1997). Case studies are high in construct validity, give in-depth insight into situations, and establish rapport with respondents (Mouton, 2001: 150). The number of units used for case studies are considerably less than those used for surveys, but the information obtained for each case is more (Rowley, 2002:17). The purpose of the study will dictate the amount of information observed by the evaluator. Because of the intense nature of case studies, a great deal is generally revealed about a person or agency (Russell, 1982:314).

Several characteristics of case studies have been highlighted by Benbasat (1987, quoted by Naslund, 2002:330):
- the event is examined in its natural environment;
- triangulation is used to collect data;
- a unit of analysis is examined and the complexity of this unit is studied intensively;
- there are no experimental controls involved;
- results rely heavily on the powers of the researcher, and

- the focus is on contemporary events which takes place.

The basis of any case study is the unit of analysis. In the current study, focus is on the individual. Some constraints could occur when choosing the unit of analysis. They are the resources available, the time available to both researcher and researched, and the accessibility of data (Rowley, 2002:19). Other constraints are discussed below.

The constraints occurring during case studies are firstly that case studies lack of rigour in the research, where biased views influence the direction of the study, its findings and conclusions. Secondly, when using case studies, there is very little basis for scientific generalisation as the data is mostly qualitative of nature. The third constraint is that case studies are time-consuming, large, and documents can be unreadable as they can be lengthy. Another concern is that case studies are difficult to execute well and correctly as the information could be biased (Mouton, 2001:150; Yin, 1984:21-22). In addition to this, case studies are limited in their application or usefulness (Russell, 1982:314).

During the data collection for case studies each source for gathering data has its unique strengths and weaknesses. This makes it necessary to triangulate data. Triangulation is a good method to use for case studies, as data gathered from different sources can corroborate the same findings or facts (Rowley, 2002:23). Data gathering for case studies include a variety of techniques, ranging from direct interviewing, observation and rating forms to skills testing. Results are generally presented in a narrative form (Rowley, 2002:18; Mouton, 2001:150; Russell, 1982:314). The results are most beneficial to use when a particular problem in a programme has been elusive to the planner.

Evidence gathered is defined as it is collected, and the researcher becomes an active agent in this process. It is therefore necessary that the researcher should ask clear and comprehensive questions, and also that he/she should be able to interpret the answers that are given (Rowley, 2002:22).

The analysis of case studies is not a simple procedure as there is a multitude of divergent information available. Some guidelines have been proposed by Rowley (2002:24) in an attempt to analyse case studies successfully. Analysis should utilise all relevant data. It should consider contradicting interpretations, and should explore these. The analysis should also pay attention to the most significant aspect of the study, and should draw on the expert knowledge of the researcher in an objective and unbiased manner.

All programmes have some form of outcome which should be measured. A programme following the outcomes-based evaluation allows the facilitator to ask whether the right programme activities

are being employed to bring about the outcomes that are needed, and to demonstrate the effectiveness of the programme. Outcomes are generally seen in terms of enhanced learning or improve conditions. Outcomes should not be confused with programme outputs, which is the product of programme activities (i.e. number of clients) (McNamara, 1999a).

When conducting research and evaluating a programme, caution should be taken to look out for the problems that could occur if evaluation is not done correctly. Several of these problems are highlighted in the next section.

2.7.5   Problems associated with evaluation

One of the main problems that can occur in terms of evaluation, is how to measure *"participation and empowerment"*, mainly because these are non-material and non-productive objectives (Oakley, 1988:3). Participants get the opportunity to assess their progress towards self-determined goals, reshaping their strategies according to their assessment (Fetterman, s.a:3). What should be judged and noted qualitatively, is that change has in fact occurred. Quantitative measurement only takes place at the start of the project, to hide the unforeseen and non-material consequences of the rural development projects (Oakley, 1988:5).

It is rare for any programme evaluation to produce a single truth or conclusion. Objectivity itself tends to be a relevant concern and concept. Evaluation could be political, social, economic and cultural. The main goal of evaluation is that of improvement, but the question to be asked is for whom and at what price. Evaluation can therefore never be neutral (Fetterman, s.a:15). Roberts (1991, quoted by Abbot & Guijt, 1998:15-16) notes certain limitations of data collection and monitoring, stating that a variety of factors (objectives, methodology, indicators, data interpretation) are generally influenced by individual or collective world views. Data collection can be seen as selective, therefore not being totally objective, but rather a particular view of an objective fact.

Evaluation also has a negative connotation. It is said to kill the enthusiasm among participants, and that it makes them tense. Some practitioners do not see evaluation as very important, and tend to use it only as a means to find out what went wrong, while not evaluating the success of a project. Some see evaluation as a very complex process and an activity that should and could only be conducted by people with scientific training (De Beer & Swanepoel, 1998:76). Another reason added by Duncan (1984, quoted by De Beer & Swanepoel, 1998:76), is that it is regarded as a threat when applying for funding, hence the need to paint a perfect picture of a project. Planning is seen as more important, so planning is used when attracting potential investors.

A further problem that was perceived regarding programmes, is that once the programme has been implemented, little is done to determine whether the implementation was successful and

whether the programme was running according to schedule. The programmes or projects run into problems in cases where there is no guidance available as to any possible corrective action which can be taken, which makes a proper feedback system to important (Sharma, 1991:58). Because most of the data collected during monitoring and evaluation is of qualitative nature, it makes it rather difficult to arrive at statistical descriptions of a large population. Another problem is that the data can be very personal, therefore subjective, according to the researcher (Babbie, 1998:303).

Caution should be taken against the urge to evaluate for the wrong reasons. The first reason is the postponement or avoidance of taking action which is regarded as unprofessional. The second is avoiding responsibility or criticism by blaming the decision on the evaluation outcome and not on the facilitator. Thirdly, evaluation must not be done for grant requirements as it is not justified, and fourthly, if evaluation is done to benefit public, evaluation shows improper expenditure of evaluation money and time (Russell, 1982:287).

2.7.6   Evaluation indicators

It is argued that all indicators used in evaluation should preferably be developed in context of the individual project or programme and its actual objectives. The culture of the local community should be taken into account when indicators are developed. The evaluation should be a learning process for all taking part in the project or programme. Another suggestion is that people's access to basic needs is not as important as those measurements of human dignity, mutual respect and solidarity. *Education, rather than material benefits, might be the most important gain in the people's assessment of what they had achieved through organisation* (Marsden & Oakley, 1990:4).

If effective monitoring is desirable, indicators become necessary. These indicators have to be suggested, negotiated, adapted and approved. For this to happen, the monitoring process should be specific, measurable, attainable, relevant and taking place within a certain time frame (Abbot & Guijt, 1998:40). MacGillivray and Zadek (1995), quoted by Abbot and Guijt (1998:41) state that...*good indicators will communicate information that is not only accurate, but also resonant for the intended audience. A 'good' indicator is one that achieves a judicious balance between accuracy and resonance.*

The evaluative component of a programme is important, as certain indicators are chosen and standards are set by which to measure and monitor the implementation and outcome the programme and its impact might have (Owen, 1999:26).

Rahman (1990:53) suggests the identification and characterisation of qualitative indicators in social development. The identification of indicators emerges because of the interactive process that involves locals. The identification is a consensual process (in other words not dictated by the

external evaluator). Indicators emerge from the social development process itself. The indicators should be consistent with social and cultural context in which the programme is operating. It is not possible to use blueprints or models as indicators as the indicators should be linked to the context and characteristics of the programme.

Any qualitative indicators used should be made subject to participants, and should be based on their interpretation, understanding and vocabulary. The key to these indicators is therefore subjectivity, which can only be achieved by the locals who are experiencing the change (Rahman, 1990:54).

Indicators chosen to evaluate a programme should all adhere to the conditions as set out below which serve as a guideline to planners. Indicators should have both quantitative and qualitative qualities: quantitative for ease and comparability, and qualitative for safety. Even though qualitative indicators are important in social programmes, quantitative indicators should be preferred, as they are more easily recorded and compared, and it is easier to identify emergent trends. To overcome the effects of blurring of qualitative indicators, the focus should be on change. Indicators that are found at the resource and effect level should get preference over those at the activity level. Indicators that offer frequent and immediate feedback, should enjoy preference as behaviour is shaped more effectively by regular feedback. Using multiple indicators is better than relying on a single indicator. Indicators that combine undesirable and desirable resources are more sensitive than indicators that are limited to either undesirable or desirable resources (Dick, 1997).

It is therefore vital to choose a combination of indicators sample ideas adequately on a regular basis. This will enable the researcher to reach a conclusion about the overall effectiveness of the project or programme (Dick, 1997).

2.7.7   Evaluation of participants

Several reasons are given as to why the evaluation of participants should take place. Firstly, it is to gather intake information in order to screen applicants so as to determine which programme or project will suit their needs the best. Evaluation should be done in a welcoming and supportive environment, and is normally done during the first meeting. It can involve an interview to determine the reason why people joined, their interests, goals, talents, and educational history. Secondly, evaluation is to diagnose each individual's educational weaknesses and strengths. This is conducted once the participants have settled in their programme and are comfortable, and provides a more in-depth understanding of the learner's strengths and skills. Lastly, evaluation is to measure the participants' progress to determine individual growth in skills. This measurement of progress should be conducted periodically to document the programme's effectiveness for the

individual and the group. These measurements could be informal or standardised. The same assessment measures should be used for all testing (pre-, interim, and post-testing) (Askov, Van Horn & Carman, 1997:66).

Evaluation data is collected from the evaluation of the programme and of the participants. This data is collected before, during and after a programme to ensure that proper conclusions can be made concerning the programme, in order to determine whether it was successful or not.

2.7.8   Community and participatory approach to monitoring and evaluation

The central role played by the local people in planning and managing the use of their surroundings, is recognised by participatory monitoring and evaluation. Since the early 1990s, emphasis has moved away from externally-driven processes and programmes to the significance of local processes to gather, analyse and use data. People are involved in stages of monitoring where they have previously been excluded (Abbot & Guijt, 1998:20). Evaluations can also be undertaken by the community members themselves, possibly leading to a more immediate perceived relevance and directly felt needs, thereby creating a more relaxed attitude to work effectively (Dale, 1998:79).

Monitoring and evaluation are essential aspects of a rural development project, as it is important to understand the results of project and to determine whether the project is indeed achieving its goals and objectives. This should be a continuous on-going process in a project (Oakley, 1988:3).

A community approach to monitoring can and should be followed when capacity building of the local people needs to take place, together with analysing change and improving local initiatives through a structured process emphasising learning (Abbot & Guijt, 1998:15). Those involved should define their own evaluation needs, build on existing intellectual and leadership capabilities and practical skills, and refine the group work methods (Feuerstein, 1988:16).

Community evaluation has received much criticism because of the fact that it is subjective by nature. Despite this, it is not possible for community development to proceed without qualitative participatory evaluation. Subjectivity will play a role and cannot be eliminated, as people and their emotions are involved, therefore creating a possible subjective or irrational experience. Qualitative participatory evaluation is therefore of prime importance (De Beer & Swanepoel, 1998:74).

Participatory evaluation is a circular process with findings and conclusions linked closely. Future actions can thus be determined and planned on the basis of the on-going project. Participatory evaluation must be "action orientated", and easy to understand. The educator is the learner and the researcher, and they facilitate construction of knowledge by the community itself (Feuerstein,

1988:18). *"Insiders' evaluations, using their own criteria of effectiveness, and their own indicators, will be more influential in determining the long term success of the group"* (Shepherd, 1998:186).

Participants and interest groups should both have a common understanding of the meaning and purpose of participatory evaluation (Feuerstein, 1988:18). Project beneficiaries should be included to monitor and evaluate rural development projects, making it a collaborative venture. It also indicates that the project objectives are being achieved (Oakley, 1988:6). Participatory evaluation seeks to engage key stakeholders more actively in reflecting and assessing the progress of the projects, and in the achievement of their results. Participatory evaluation is results-based, as the achievement of results is evaluated. Stakeholders are involved in identifying what should be evaluated, who should be involved, when it should occur, participatory methods to collect the data, and how the findings will be compiled. Random sampling and triangulation are integral to this process (Coupal, 2001).

Participatory monitoring and evaluation has four main purposes, as represented in figure 7.
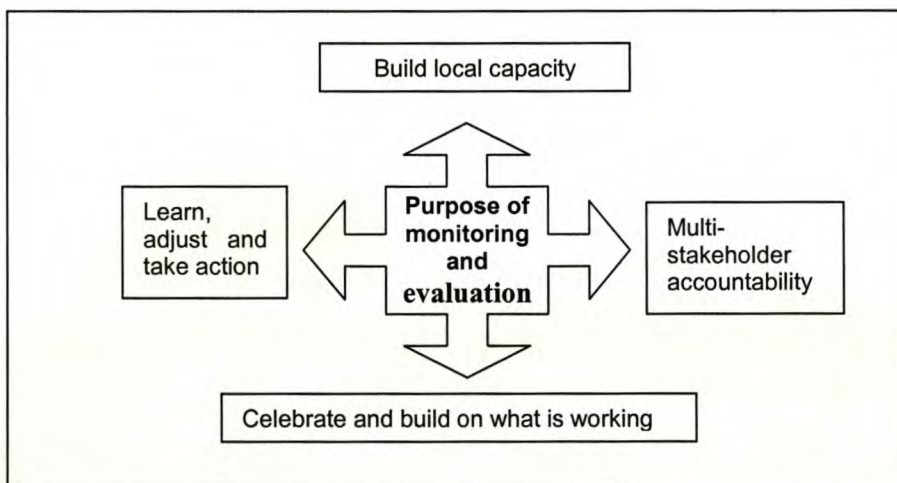
Figure 7: Purposes of participatory monitoring and evaluation (Coupal, 2001)

For collaborative evaluation to occur, three mechanisms are suggested by Dale (1998:84). Firstly a constructive participate environment should be created, where outsiders and locals are seen as "co-discoverers". Negative findings should be seen as a reason for improvement, and partnerships with various stakeholders should be promoted. Secondly, the voice of the beneficiaries should be included, incorporating their views on evaluation, their experience and wisdom, and the most marginalised should be included. Thirdly, communities should be assisted to use the evaluation findings to strengthen them. The communities could, for instance, use the media to spread important information, create links for those who may use information, or community organisations could build on their experience.

2.7.8.1 Principles for community development evaluation

Several principles for community development evaluation are highlighted by Anayanwu (1988:15). The researcher portrays subjective commitment to the participants by identifying with them. This requires learning from the people, as well as patience, apathy and flexibility of attitude, making it possible to adjust the pace of participatory research. The research becomes a participating social actor, aiding in generating an awareness of problems that are inhibiting the community's social progress. The research technique used should combine data gathering with an active endeavour to understand the underlying conditions of community problems and it should be a learning process for both the researcher and community. This technique allows the participant to produce knowledge and the potential to analyse it.

2.7.8.2 Principles for participatory evaluation

Principles of participatory evaluation have been formulated. Participatory evaluation should involve and should be useful to the end users of the programme. Those participants who are influenced by the objectives should be directly involved (Tandon, 1988, quoted by Burke, 1998:44). Those participants are referred to here as key stakeholders. It must be context-specific, rooted in the concerns, problems and interests of the key stakeholders (Tandon, 1988, quoted by Burke, 1998:44). The context and purpose should have an effect on the way the evaluation is planned and implemented. The methodology used should show respect for the knowledge and experience of the key stakeholders. Participatory evaluation embraces the subjectivity of stakeholders (Burke, 1998:44), and cannot be disinterested. Participatory evaluation should promote empowerment of the powerless in an evaluation context, and should also show definite interest in the process and results (Burke, 1998:44). Participatory evaluation favours collective measures of knowledge generation and it is a collective process of planning and reflection (Tandon, 1988, quoted by Burke, 1998:44). The facilitator shares power with the key stakeholders, and should have confidence in the stakeholders with the ability to hand over responsibility to the stakeholders (Chambers, 1997, quoted by Burke, 1998:44). The evaluator critically and continuously evaluates their personal attitude, behaviour and ideas, making it possible for them to learn from their own mistakes (Chambers, 1997, quoted by Burke, 1998:45).

Participatory evaluation and participatory research are both relatively new concepts. Project beneficiaries should be included to monitor and evaluate rural development projects, thereby making it a collaborative venture. Participatory evaluation also indicates that the project objectives are being achieved (Oakley, 1988:6). Participants and interest groups should both have a common understanding of the meaning and purpose of participatory evaluation (Feuerstein, 1988:18). Participatory evaluation involves local people, development agencies and policy-makers, who together decide on how the progress should be measured, and how to act on results. Lastly, participatory evaluation helps to reveal lessons and improve accountability (IDS policy briefing, 1998:1).

Table 10 illustrates the differences between conventional monitoring and evaluation, and participatory monitoring and evaluation.

Table 10: Differences between conventional monitoring and evaluation, and participatory monitoring and evaluation

Some differences		
	Conventional monitoring and evaluation	*Participatory monitoring and evaluation*
Who initiates	The donor, senior managers and outside experts	The donor, project stakeholders, managers, often helped by the facilitator
Role of primary stakeholder	Provides information only	Designs and adapts methodology, analyses and corrects data, shares findings, links to action
Purpose	Donor accountability	Capacity building, increases ownership over results, multi-stakeholder accountability
Who evaluates	External evaluator, mainly quantitative indicators	Project stakeholders, assisted by the facilitator, mostly qualitative indicators
Designers	Donor with limited input from project	Project stakeholders
Methods	Survey, questionnaire, interviews, focus groups	Participatory learning and action, testimonials, appreciative enquiry
Outcome	Final report circulates in-house only	Better understanding of local realities, involved in decision-making, meets results better, adjusts projects with gathered information
Approach	Predetermined	Adaptive

(Coupal, 2001; IDS policy briefing, 1998:1)

It is vital for them to use this process if governments and organisations want to judge whether development efforts have failed or succeeded. Participatory monitoring and evaluation has emerged because of the recognition of limitations of the conventional evaluation approach (IDS policy briefing, 1998:1). Coupal (2001) and the IDS policy briefing (1998:1) have highlighted the differences between conventional monitoring and evaluation and participatory monitoring and evaluation, which are demonstrated in table 10.

To summarise, it could be said that evaluation could be done for a variety of reasons. These reasons vary between assessing the appropriateness of a programme, to identifying ways to improve the delivery of interventions, or using evaluation for administrative purposes (Rossi & Freeman, 1993:34). The study usually determines which type of evaluation is used.

CHAPTER 3

METHODOLOGY

The study in question was conducted by means of a survey procedure, and evaluation research through a PAR approach. The survey procedure is usually used to provide a broad overview of a representative sample of a large population and has a descriptive nature (Mouton, 2001:152). A survey was done as part of the context analysis as well as to determine a selected part of the community's interest in an adult education programme dealing with entrepreneurial skills-training. The evaluation research included participants actively taking part in evaluating their progress during each PAR cycle, together with case studies of the remaining participants in the programme which covered aspects of empowerment of each remaining participant, their perception of the programme, and the researcher's evaluation of the programme.

This chapter explains the steps followed in conducting the survey and the evaluation research. Firstly, a context analysis of the demarcated rural area (as stated in objective 1.3.1) was conducted. This covered aspects concerning the geographical area. Once this was completed, it was necessary to establish contact with potential stakeholders to ensure that the training could take place. The next step was to identify a possible resource centre where training could take place. Different characteristics of the centre were noted to determine whether it would be suitable as a training venue.

Once the context had been researched, it was possible to proceed with determining the interests regarding skills-training among the community members (as in objective 1.3.2). This took place by means of an interest survey conducted in two identified neighbourhoods.

When it was determined that there was in fact interest in skills-training projects, the researcher could plan a non-formal adult education programme that would address the needs of participants (as in objective 1.3.3). The programme consisted of smaller projects, conducted in the PAR research method.

To verify objective 1.3.4, regarding the evaluation of the non-formal adult education programme, the empowerment levels of the participants had to be measured using a standardised pre- and post-test questionnaire (as in objective 1.3.4.1) (Albertyn, 2000). These levels helped confirm what was observed by the researcher concerning the behaviour of participants. To determine the success of the programme, a post-test questionnaire (as in objective 1.3.4.2) was used to determine a) the participants' perception of the programme (of the facilitator and the group climate), and b) what the outcomes of the programme were (see Addendum 3) according to the researcher.

The evaluation of the programme was documented in four case studies (as in objective 1.3.5). Each case study looked at a variety of data sources and data gathering techniques. General information was gathered regarding participants in the programme by means of a questionnaire (see Addendum 2), followed by observation by the researcher of the behaviour of participants.

3.1   Context analysis of a demarcated rural area

3.1.1   Defining the geographical area and conducting a context analysis

The area of study was chosen according to certain guidelines given by the organisation promoting the Development and Advancement of Rural Entrepreneurship (DARE) programme. It was launched by the Department of Consumer Science: Foods, Clothing, Housing at the University of Stellenbosch. The main focus of this programme is to assistant rural communities to help them deal with the problem of unemployment and poverty, by providing support and training to potential local entrepreneurs. Montagu was chosen as a research area as it is classified as rural, with a vast number of resident unemployed people.

A context analysis pertaining to the town of Montagu was conducted to identify and to document relevant information and facilities. Different information sources were utilised, ranging from government documents to the Information Bureau of Montagu. The researcher gathered information regarding the area, studying factors like the population figures, employment opportunities and educational issues. Once this was completed, the next step was to establish contact with possible roleplayers in the area, looking at possible training opportunities which existed.

3.1.2   Establishing contact

Contact was established with potential stakeholders. It was important for access to the community that the researcher placed high priority on informing stakeholders of the purpose of the research. Initial contact should always be neutral, but at the same time informative. Stringer (1996:44) states that an ongoing process of communication should be established once the initial introductions have been completed. The researcher made contact with the manager at the community centre, MAG, in January 2001. It was to determine whether the manager regarded the type of entrepreneurial training programme envisaged as necessary.

3.1.3   Analysing MAG as a resource centre

The available facilities at MAG, as well as previous training opportunities offered there, were ascertained and documentation on training programmes that have been presented there, was

analysed. The information was gathered at MAG, by researching their diaries concerning all training that had taken place. It was also necessary to determine whether the MAG centre was adequate to use as a training facility by the researcher, with the necessary resources to use if training was to take place.

The researcher had access to data pertaining to the participants who had previously attended training courses, including their names and contact numbers. Each person on the address list was contacted to determine certain factors pertaining to the course the person had attended previously. These factors included whether the person actually attended the course as recorded, and whether or not he or she is making use of the knowledge acquired at the course. If a negative response was received regarding the use of acquired information, the researcher wanted to know what the reason was. If the response was positive, the researcher wanted to determine how this information was being applied in his/her daily life.

3.2   Interest survey

During informal discussions with community leaders, the researcher received negative feedback from a roleplayer in the community regarding interests of the members, namely that participants expected payment for their attendance at meetings. This led to the introduction of the interest survey by the researcher to decide whether it was feasible to continue with the research and the skills-training programmes.

Literature emphasises that rural people tend to grow aware of the gap that exists between what is, and what ought to be. This gives the researcher the ideal opportunity to identify, in collaboration with the community, what their problems are. Together they can then devise a way to solve the problems. In this way, the community will become aware of the social reality, and adopt the necessary changes (Anyanwu, 1988:14).

According to Owen (1994:41), this type of evaluation is known as a *proactive evaluation*. It is carried out before a programme commences, and assists programme planners in deciding what type of programme is needed. Some typical issues highlighted is whether a programme is actually needed, what type of practice is the best to use in a specific area, and what does the research tell about the particular problem.

The selection of fieldworkers to carry out the survey, the target group, and the questionnaire determining interests in skills-training, are discussed in the section below.

3.2.1 Selection of fieldworkers

It was decided to use the services of two fieldworkers to conduct the survey. Both were employees at MAG, and they therefore had contact on a regular basis with the Montagu people who came to the centre for help. The fieldworkers were also familiar with the neighbourhoods identified, as one of them lived in the area, and the other had family residing there. The two fieldworkers were then familiarised with the questionnaire. The researcher discussed the questions with them, giving advice about asking the questions and writing down the answers. It was decided that the fieldworkers would conduct the interview and complete the questionnaires, so as to avoid embarrassing illiterate respondents and to ensure that answers were filled in correctly, thus gathering reliable data.

3.2.2 Sample selection

Two adjacent previously disadvantaged neighbourhoods were identified to conduct the survey. Both were within walking distance of the training centre making it easily accessible in case respondents would be interested in participating in any proposed skills-training activity.

A random systematic sample was selected. According to this selection, fieldworkers then approached every third house in the neighbourhoods. If an adult was present, he or she was asked to respond to a questionnaire (see Addendum 1). The questionnaire was read to the respondent, and completed by the fieldworker. If there was more than one potential respondent at home, fieldworkers gave them a choice as to who would like to take part in the survey. As the study pertained to adult education, no children were considered as respondents.

3.2.3 Questionnaire

The questionnaire used in the survey was designed to gather information on interests regarding possible skills-training (see Addendum 1). The questionnaire was divided into four sections. The first section consisted of questions regarding demographic data (gender and age of respondents) as well as the length of time they had been living in Montagu. The latter was to ensure that respondents were inhabitants of Montagu. The second section gathered information regarding the respondents' educational qualifications and training experience received. The third section covered the interests of the respondents. The final section was to determine the specific type of training in which respondents were interested, what they felt was necessary for themselves and the community. The amount of time they would be prepared to spend on training and whether they would use the training to generate an income for themselves, were also determined by questions.

After it was ascertained that there was an interest in skills-training projects, the researcher proceeded with a process of planning, implementation and evaluation of an adult education programme.

3.3   Developing and evaluating training projects

3.3.1   Selection of participants

All the interested community members could attend the non-formal adult education programme on a voluntary basis. There was no limitation on the number of people who could attend. This voluntary participation provided the opportunity for community members to join and leave the programme at any stage without permission, therefore, a possible drop-out rate could be expected. People who responded to the posters that advertised the proposed programme and who attended the first PAR cycle, became the participants. New participants joined the programme at different stages.

3.3.2   PAR approach

A participatory action research (PAR) approach was followed to implement, monitor and evaluate the non-formal adult education programme. PAR sets out to link practice and its analysis into one continuous flowing sequence. This sequence aims to link researchers and participants into one group of interested parties (Winter, 1996:14). Each cycle in the PAR research method consists of four stages, namely to plan, act, observe, and reflect. A cycle can start at any of these four stages, and they do not always occur in the correct order and systematically. At certain stages two stages could become inseparable, flowing into each other, making their line of distinction unclear (Hodgkinson & Maree, 1998:58). In this study a total of 15 cycles was reported, as set out below.

The activities of each cycle were observed and documented. Different aspects were identified and documented during each cycle. These aspects ranged from observing the behaviour of participants during meetings, discussions and interviews with participants, noting how they interacted with one another and with the researcher, and the attendance rate that was maintained. In the reflection stage of the PAR cycle, participants and the researcher discussed the actions, and a rediagnosis of needs took place. In the documentation of this cycle, the researcher also reflected on the data gathered by means of the research methods, and, reflecting on what had occurred, interpreted the events. From this, conclusions were drawn and a revised plan of action formulated in collaboration with participants, taking into account what was to occur during the following cycle.

During the programme, different data collection techniques were used depending on the project presented. This included informal interviews that took place during each PAR cycle with participants. Questionnaires were used to determine the whether the community showed an interest in training programmes, and to gather participant information (see Addendum 1 and 2). Field notes were made by the researcher, together with observations (see PAR cycles), and photographs were taken to observe group interaction between participants, as well as specifically looking at the seating arrangements during the training sessions. The framework used to triangulate the data, was the PAR research method as several data collection techniques were used during the cycles to ensure that data was reliable and valid. This strategy is used to explore and solve problem issues that are experienced by participants in a participative manner. McNiff (1997:3) points out that the action of the research entails changing the lives of people and therefore the system in which they live.

As the PAR method was followed during the research procedure, participants were also involved in the evaluation. This evaluation took place during the reflection stage of the PAR cycle. Participants identified the project goals, and helped to establish criteria for success, together with identifying their roles in the evaluation process. This method in which participants get the opportunity to change and evolve interactively throughout the duration of the project is supported by Darling (1998).

3.4 Case studies and participant evaluation of the programme

It was necessary to determine whether the skills-training programme had been successful. Different means were used to gather information in order to evaluate the success. A total of four case studies were documented, as these were the only remaining participants on conclusion of the programme after the nine month period. Each case study reports general information of the participants in the non-formal adult education programme, together with their progress as observed by the researcher. The pre- and post-test empowerment levels of each participant were taken into account and this data was noted in addition to the case studies discussion on each participant. The response on the questionnaire that was specifically developed to evaluate the success of the programme, was then added to the data of the case studies and empowerment discussion. The participants had the opportunity to evaluate the programme success with the questionnaire, and the facilitator made deductions regarding the success of the programme.

Each case study focuses on one participant, giving an overview of that person's demographic data, his/her specific interests, what, if any, the person's own development was during the programme, his/her empowerment levels, and how the participant applied his/her skills to generate an income, which reflects on the success of the programme.

The literature states that data gathering for case studies includes a wide range of techniques, ranging from direct interviewing, observation, and rating forms to skills testing. Results are generally presented in a narrative form. It is most beneficial to use when a particular problem in a programme has been elusive to the planner (Mouton, 2001:150; Russell, 1982:314).

In this research, the researcher used the case study procedure to gather in-depth information regarding all the participants who completed the programme. The information used for each case study was gathered from an individual information survey (see Addendum 2) together with observation gained by the researcher during the different PAR cycles, as well as informal interviews conducted with each of the participants. Additional biographical information was gathered regarding eight other participants who attended the meeting during cycle two. This can be viewed in Addendum 5.

3.4.1. General information of participants

The case studies report the *demographic data* of participants (age, gender, home language, family composition, employment status, financial support, and level of education). This is followed by a discussion on the *interests* of the participants, what they enjoy doing in their spare time, and whether they could link this with some form of income-generation. The *participant development* aspect therefore covers aspects concerning the development of the participant as observed by the researcher during the programme, and whether skills were applied once the programme was completed.

3.4.2 Empowerment evaluation

Empowerment evaluation took place by utilising a pre- and post-test questionnaire on empowerment. The pre-test took place on 14 May 2001, and the post-test on 26 October 2001. In this case a standardised questionnaire was used to determine the levels of empowerment of each participant (Albertyn, 2000). Each participant was evaluated according to three *empowerment levels,* namely the micro-, interface, and macro-levels. On the micro-level, the empowerment level refers to the personal feelings of the participants, and the amount of control they have over their immediate environment. On the interface level, empowerment measures the participants' ability to bring about change in the conditions and relationships immediately affecting them. On the macro level, empowerment combines consciousness raising and participation (for) the participants in society (Albertyn, 2001:20). The results were analysed and focused on the empowerment status of the four individuals who completed the programme. This was followed by a discussion and a possible explanation of the influence of the programme over a period of time. The empowerment questionnaire used, was an existing instrument designed by Albertyn (2000), which has certain advantages. Because it had already been tested during previous studies, making use of this

questionnaire saved time. Furthermore, because it had already been tested, the measurement it produced, offered high validity and reliability (Mouton, 2001:100).

To assist with the empowerment process, an effective research method to use is that of PAR. It uses mainly qualitative indicators to gain understanding and insight into the lives of the participants, and it has a strong commitment to the empowerment of participants and to changing their social conditions (Mouton, 2001:150-151).

One of the aims of the non-formal adult education programme presented as part of this study, was to facilitate empowerment through skills-training projects. This included teaching participants entrepreneurial skills. It was therefore decided to carry out the pre-test of empowerment levels during PAR cycle four. The pre-test empowerment questionnaire was completed by all the individuals who were attending the programme. The pre-test took place on 14 May 2001, prior to the business course. Eleven participants completed this questionnaire. The post-test questionnaire was completed on 30 October 2001 during PAR cycle 13. At this stage of the programme, there were only four remaining participants. They all completed the pre- and post-empowerment questionnaire.

The researcher was assisted by a guest facilitator during the completion of the pre-test questionnaire. All participants were aided in the process, with the facilitators paying individual attention to each one during completion of the questionnaire. Each participant was individually assisted, to ensure that there were no complications or misunderstandings regarding the questionnaire. During the post-test, four participants took part, with the researcher assisting them. During the course of the programme, a number of participants dropped out. Their empowerment data is therefore not included in the study.

All data gathered by the empowerment questionnaire was analysed by a statistician. The pre-test score was used as a baseline against which to measure the scores of the post-test. The results can be seen as an indication of the amount of empowerment that took place over the designated timespan of five months.

Data was coded according to the pre-test and post test scores, with frequency tables being drawn up. Each of the four participants were compared on an individual basis, by comparing the results of the pre-test and post-test. Together with this, the results of the group were compared, to determine the level of empowerment of the group.

3.4.3   Programme evaluation by participants and facilitator

The participants' perception of the programme was measured, using a questionnaire (see Addendum 4) which was developed by the researcher according to literature (see dendrogram Addendum 6). This was used as a post-evaluation research method, and it is discussed under two main categories. The first deals with the participants' perception of the programme. This includes their perceptions of the researcher, teamwork and atmosphere during the programme. The second section evaluates the programme according to the facilitator. It includes the application of the skills the participants had acquired during the programme. The application of skills focuses on whether the participants apply the handicraft skills they acquired, the marketing of their products, and how they manage their finances.

As the literature states, a post-evaluation needs to address several issues, one of them being the focus on the information about the programme itself. This helps people to associate with the programme to understand it better (Grotelueschen *et al.*, 1976:48). The key to evaluation success lies in determining whether an identified programme is reaching its goal(s). Knowledge of the pre-determined goals gives valuable insights into the functioning of a particular organisation or structure. If the measurement of stated goals does not take place, two aspects are at risk, namely not being able to learn key information pieces concerning the desired outcome, and providing evaluation which will be ignored by those who are aided in the development (Poulin, Harris & Jones, 2000:516-517). It is therefore crucial to determine, by means of the post-evaluation, whether these learning goals have been reached, and if not, what the possible reasons are for this (Moran, 1997:6).

During the initial stages of the skills-training programme, the participants were asked what they wanted to learn, and how they wanted to apply these skills. This is supported by the literature, that during a post evaluation, the data collected concentrates specifically on the participants' knowledge, skills and values they have acquired and attitudes they feel towards the programme (Caffarella, 1994:135).

It is important to gather information concerning the outcomes of a programme, as these outcomes are the benefits for the participants during and after their programme involvement (Owen, 1999:264). The outcome of the programme in this study was to find out whether it was possible to develop entrepreneurial skills by using a non-formal adult education training programme following a PAR research method.

The questionnaire is divided into two main sections, firstly looking at the participants' perception of the programme, followed by the researcher's perception of the participants' application of skills

acquired during the programme. Each question asked is formulated according to the dendrogram (see Addendum 6) and is backed by literature, as will be discussed below.

3.4.3.1 Participant's perception of the programme

It was important to determine what the participants thought of the facilitator with whom they had frequent contact during the programme, and also to determine whether the expected needs of the participants were met, and how they experienced the group climate.

One of the success factors of a programme is the participation by both the facilitator and the participants themselves. There should be a mutual understanding between the two parties, with the facilitator being a guiding force during the programme. If the facilitator does not get along with the participants, there is little chance of success. According to Burke (1998:49-50), the facilitator should be able to work in a team, should have group facilitation skills, and should be able to communicate ideas and thoughts clearly to all participants.

The role taken on by the facilitator should be seen and perceived as non–threatening by participants. Body language, dress, speech, and behaviour should be unpretentious, purposeful and inquiring. The facilitator should have a set agenda, and should inform the people of the purpose of the programme. This will allow the people involved to understand the concerns of the researcher, and what part they play in it (Stringer, 1996:45). The facilitator should take on a people-centred approach, where flexibility is high, and interest is stimulated (Robinson, 1995:57).

Facilitators should be aware of being too closely associated with a participant, favouring an individual. All participants should have the courage to converse freely with facilitators, without fear that their comments might be passed on to other participants whom they might not trust. An adult learning environment should be created by the facilitator where mutual respect can be shown, in an informal, friendly and supportive atmosphere. This non-threatening environment would help adults to diagnose their needs with greater ease, and they could be involved in planning and conducting their own learning (Robinson, 1995:56).

The ideal facilitator qualities are highlighted by Robinson (1995:62), namely being warm, caring and accepting of the participants. The facilitator should have a high regard for the competence level of participants in their own planning. A facilitator should be open to change and new experiences. Stringer (1996:59-62) also highlights certain characteristics that a facilitator should bring into a programme, namely that he/she should present him/herself as a resource person. The facilitator should be aware of the say he/she dresses and his/her appearance, and should establish their purpose in a non-threatening way. The facilitator should be able to associate with all groups, be visible and accessible, and should meet in places where participants feel at home.

It is important to acknowledge participants and their responses, which are their attempts to learn. This creates a positive climate for learning. While acknowledging participants, facilitators should learn to listen, show interest and be alert, paying attention to what is being asked (Robinson, 1995:59-62).

Motivation is a keystone in the learning process of any individual. Participants should be motivated to achieve goals set out at the start of a programme. *"Motivated experience results from knowledge gained during encounters relating to the satisfaction of needs"* (Walkin, 1990:1). A facilitator should provide plenty of encouragement and motivation during a programme, to ensure that participants are motivated in what they are doing (Kotzé & Staude, 1996:107).

Several criteria are necessary to determine whether the **identified needs of the participants were met** during the programme and to **evaluate their experience of the group climate (teamwork and atmosphere)**. Participants should also have the freedom to articulate their own needs during the programme (Kotzé & Staude, 1996:107). Once a need assessment is done, certain goals are set for participants to work towards. Even though they participate in their own needs assessment, it is very important that false hopes concerning possible achievements are not created (Caffarella, 1994:77).

Participants in a programme bring with them certain expectations regarding the purpose of the activity they are to take part in, the procedure that will be followed, and what they might learn from it. If these expectations are not met, participants might not actively engage in an activity or programme. It is therefore important that the expectations and intents of a programme are available to facilitators if a programme is to be successful, and this can be determined by means of evaluation (Grotelueschen *et al.*, 1976:181).

Participants should be encouraged to reflect on their learning experience, determining whether their work showed progress, and if they needed additional practice (Askov *et al.*, 1997:71). They should also be given the opportunity to evaluate their own progress in a programme, to judge themselves on how well they are doing (Robinson, 1995:82).

Group atmosphere and the manner in which people participate in it play an important role in any programme. It is therefore necessary to determine whether participants feel influenced or pressurised by a group member, or by the facilitator. As Robinson (1995:59) puts it, *"If conditions for learning are unpleasant, people will avoid the situation, avoid leaning, and may learn to hate the subject"*. Another key element of evaluation is that the process should acknowledge inequalities of power among the participants and should deal with it. If there is any imbalance between the participation of the group members, this should be rectified immediately (Burke, 1998:45).

The learning environment that is created should have a climate of mutual respect, and should be supportive, friendly and relaxed. If educational settings are non-threatening, adults could diagnose their own needs, and could become involved in the planning and conduct of their learning. Personal commitments to a group could be enhanced by the group's interaction and support, and this commitment is normally accompanied by some form of transformational changes (Robinson, 1995:41,56).

Participants should be given the opportunity to take part in the decision-making process of the programme. Their involvement is of key importance and participants should have the opportunity to see tangible evidence of their personal contribution during the planning phase. The more participants start to perceive their own influence in the project or programme, the greater will be their ability to gain control over issues that affect their lives (Whitmore, 1988 quoted by Burke, 1998:45).

3.4.3.2 Researcher's perception regarding participants' application of skills

Because a major part of the programme focused on the participants acquiring new skills, it was important to determine whether they applied what they had acquired regarding entrepreneurial development. The researcher needed to evaluate whether their newly acquired skills from the programme were being put to use by the participants, whether they were making gifts or items to sell. This was evaluated in section two of the questionnaire. The two most important criteria that the researcher needed to determine was whether products were being made, as this was an indication of the application of the handicraft skills learnt. The second criteria was to determine the level of management of financial application, which reflected on the business skills learnt.

There is a definite relationship between learning and assessment activities. Assessment activities provides feedback that enables facilitators and learners to make adjustments in the programme. If done during a programme, participants would most likely show improvement once the assessment has taken place (Moran, 1997:5). An educational programme should focus on what participants learn, and how the learning results in any possible change. Some of these changes are immediate, like learning a new skill (Caffarella, 1994:23).

Assessing learning activities is necessary to determine whether what was taught, was also understood and whether it was applied. It is necessary to determine whether the acquired skills are helpful in the lives of the participants (Moran, 1997:3) and, as in this case, whether the participants were using their acquired skills to generate an income for themselves.

When adults make the decision to participate in a learning experience, two factors are compared, namely *cost* versus *benefit*. If the costs exceed the benefits, participation will not occur. Some of

the costs can be described as obstacles. These obstacles can prevent a participant from taking part in a programme, or from carrying it through. These obstacles have to be kept in mind when designing a programme to suit the needs of the participants. Some of the obstacles could be a lack of transport, lack of time, money problems, and child care services (especially for women) (Grotelueschen *et al.*, 1976:99). Several barriers to participation are highlighted by Burke (1998:52) which could have an impact on the choice of methods used during evaluation. Time constraints, age, geography, and physical challenges can all be seen as potential barriers which could influence evaluation. With ageing, a decline of energy generally occurs, together with some loss in audio and visual acuity. These physiological changes could bring about certain defences in adults, like taking on extreme positions with no real justification, intolerance for ambiguity and limited choices (Robinson, 1995:29).

Some participants could show resistance to learning, but it is up to the facilitator to find out whether this resistance is justified, by researching the background of the participant. A facilitator should also remember not to push the participants too much in terms of what they are learning, but should rather give them time to work through new ideas and actions (Robinson, 1995:73).

The five-day business course emphasised the importance of market research and identifying possible markets and selling outlets. It was therefore important to determine whether these acquired skills were actually applied during the selling of the participants' own **products**. Literature states that it is possible that participants could have unrealistic expectations regarding their markets and their sales of products, because they fail to analyse the aesthetic appeal of products correctly and sometimes applying incorrect pricing strategies (Trollip, 2001:47).

An important focus of entrepreneurship is that of **managing finances**. This ranges from being able to budget for stock, buying stock, correctly pricing items and selling items at a profit, using the extra income to continue with the business. Applying the knowledge acquired was another focus of the five-day business course, and the researcher felt it was important to determine whether participants did carry this through. Ellis (1985:66) states that an individual's level of living and his/her resources should be determined, and that it is also important to find out how available income is used to purchase goods and services.

CHAPTER 4

RESULTS

The results are discussed in the same sequence as the objectives. First, attention will be paid to the results gathered from the context analysis (as in objective 1.3.1). The geographic location and its context, demography, the economy of the area, transport, services and the training centre will be analysed and reported on.

In objective 1.3.2, the interests of the community were determined by means of an interest survey. Different aspects considered were demographic data, educational qualifications, training interests and specialised training interests.

Once the interests were determined, it was possible to develop a training programme, consisting of smaller projects (as in objective 1.3.3). These are documented in the form of 15 PAR cycles of various time periods. Each cycle consisted of four stages. During planning, problems were analysed and a strategic plan was developed. All the planned activities were prioritised, and tasks were listed. During the action stage, the strategic plan was implemented. During observation, effects of the plan were monitored, with possible problems noted. Evidence was gathered, together with the classification of data. During reflection, outcomes were reviewed, and the effectiveness of the programme was judged (Hodgkinson & Maree, 1998:61). The effectiveness of the programme is an essential element of formative evaluation as it provides the researcher and participants with an indication as to whether the programme should be adapted (Bless & Higson-Smith, 2000:51). A revised plan followed reflection, where recommendations are made regarding what should occur during the next cycle.

The non-formal adult education programme is evaluated (as in objective 1.3.4) by making use of an empowerment questionnaire (as in objective 1.3.4.1), as well as a questionnaire to evaluate the success of the programme (as in objective 1.3.4.2).

All the data from the evaluation were captured in separate case studies (as in objective 1.3.5).

4.1 Context analysis of a demarcated rural area

4.1.1 Defining the geographical area and conducting a context analysis

The town Montagu is situated in the Western Cape, roughly 220 kilometres from Cape Town. It falls under the Breede River Winelands Municipality, together with four neighbouring towns, namely Robertson, Bonnievale, Ashton and McGregor. Montagu serves as a halfway point

between Cape Town and Oudtshoorn. It was founded in 1851 by John Montagu, who was the British Colonial Secretary of the Cape Colony (John Montagu guest house accommodation website).

Montagu forms part of the recently developed *Route 62*, which is based on the same concept as *Route 66* in America. They both served to link rural towns and villages to major centres, but were replaced by highways, diverting traffic along more direct routes. *Route 62* is now being utilised by tourists to explore this part of the Western Cape (Route 62 website).

Route 62 has been noted as being the longest wine route in the world. The longest part of this route is between Cape Town and Port Elizabeth, covering a distance of 850km. It runs via Paarl, Tulbagh, Worcester, Montagu, Oudtshoorn and Uniondale. There are seven official wine routes on *Route 62* of which Montagu forms part of four routes, making it a popular destination (Montagu tourism bureau).

4.1.1.1 Demography

The town Montagu and its rural area have an estimated population of 15 761 inhabitants, of which 8 953 live in the town itself. The rural population of Montagu is 6 808. The following table is an estimated figure of the population figures for the year 2001. A few discrepancies are clear in table 11, one example being the number of Asians accounted for, and the relatively low number of Blacks. This might point to the problem of collecting valid and reliable data in rural areas, due to unforeseen factors.

TABLE 11: Estimated population for 2001 in Montagu

	Black	Coloured	Asians	White	Unspecified	Total
Montagu rural	206	5541	0	928	133	6808
Montagu town	92	6666	14	2100	81	8953

(Breede River Winelands Municipality Document, 2002:9)

A summary report concerning the South Africa (1998), states that the desired properties of the indicators used for monitoring and evaluation should be unambiguous, specific, sensitive, and consistent. A level of inconsistency in population figures can be seen when comparing table 11 with table 12, concerning employment rates in the Montagu area. The population figures do not correspond with one another, showing large discrepancies. When calculating the number of people who are employed and unemployed in Montagu (Table 12), the total figure is 2 914. In Table 11, both Montagu rural area and Montagu town have much higher figures, showing a discrepancy.

Table 12: Employment rate of Montagu

	Black		Coloured		Asians		White	
	Employed	*Un-employed*	*Employed*	*Un-employed*	*Employed*	*Un-employed*	*Employed*	*Un-employed*
Montagu	35	1	1723	618	3	0	513	21
Total (Breede River area)	1710	1202	17560	3153	23	0	3494	120

(Breede River Winelands Municipality Document, 2002:12)

An employment market that provides a high number of seasonal jobs, is fruit harvesting (grapes, apricots, peaches, apples and pears) that occurs in this area. This accounts for the high number of seasonal workers. In the Breede River Winelands area, the Coloured workforce makes up approximately 64% (17 560) of all those employed (as indicated by table 12), of which the Coloured community in Montagu makes up roughly 9,8% of this workforce. No specifications were given as to the type of employment in which these people partake (Breede River Winelands Municipality Document, 2002:11).

During the analysis of the poverty situation in the Western Cape in terms of the 1996 Census, 63,2% of the people in Montagu earned less than R 18 000 per year (Breede River Winelands Municipality Document, 2002:28). One of the main reasons behind this is the high rate of seasonal work in this area.

4.1.1.2 Economy

Montagu's primary focus is farming, and the town is surrounded by the Langeberg mountain range, which produces a variety of fruits such as grapes, apricots, peaches, apples, and pears. The farmers in Montagu area are now establishing their own citrus orchards. Grapes make out a large proportion of the farming income, with the area specialising in red and white muscadel grapes (John Montagu guest house accommodation website). *Ashton Canning Company (Pty) Limited* and *Langeberg Canning Company (Pty) Limited* are situated in Ashton, and provide seasonal employment for many people in the neighbouring areas.

The fact that so many of the inhabitants are dependent on seasonal work has a direct influence on the poverty factor. The living standards of many people drop once seasonal work is completed. Another factor leading to the high rate of poverty, is the closing down of production layouts and factories, providing less opportunity for employment (Breede River Winelands Municipality Document, 2002:26).

The Montagu Tourism Bureau estimates the passing through of about 140 000 tourists per year. Accommodation available ranges from two hotels, 20 Bed and Breakfast facilities, 40 self-catering facilities, with one full-board facility. These figures only reflect those places that are registered with the Montagu Tourism Board (MTB). There could be additional accommodation available that is not listed (Montagu Tourism Bureau).

There is great potential for the economy in this town to flourish when considering the vast number of tourists that pass through Montagu annually. The town is known by many as the *Town for all seasons*. It has a pleasant year round climate, making it ideal for tourists to visit the town throughout the year (John Montagu guest house accommodation website).

One of the major attractions situated on the outskirts of Montagu, is the hot water mineral springs. The natural spring water is hot, and was believed (by the early trekkers) to have healing powers (Montagu Tourism Bureau). Other attractions include the Montagu museum, with the oldest house dating back to 1853, and which has recently been restored. Many tourists also visit the area to make use of its rock climbing facilities.

4.1.1.3 Transport

Public transport is not very easy to come by in Montagu. An estimated 75% of the people in Montagu make use of taxis in the area, while a meagre 10% rely on private transport. About 15% of people travel by foot. Together with this, there is no train station in Montagu. The closest station is at Ashton, which is approximately 10km from Montagu and the closest aerodrome is at Robertson, handling approximately 10 flights per week (Breede River Winelands Municipality Document, 2002:12).

4.1.1.4 Services

Montagu has its own educational institutions (see table 13), but there is an inclination towards poor class attendance. Another problem which is highlighted in the Breede River Winelands Municipality Document (2002:19), is the fact that many of the parents cannot afford school fees, creating an additional problem of attendance, together with the fact that the quality of education is not up to standard in some of the institutions. There is also slow progress with the integration of schools in these regions.

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Table 13: Educational facilities in Montagu

Type of institution	Number of institutions	Number of pupils	Number of educators	Number of classrooms
Kindergarten	1	21	2	2
Pre primary schools	4	170	10	10
Primary schools	2	930	28	N/A
Secondary schools	2	1178	39	N/A

(Breede River Winelands Municipality Document, 2002:13)

Several strategic focus areas were highlighted during a municipal meeting concerning the Breede River region, namely service provision, local economy, social and welfare aspects, agriculture, safety and security, and tourism. Under the social aspects, a great need was identified for education in connection with economic and entrepreneurial development, together with the education of adults in the community with a programme focusing on the development of skills (Breede River Winelands Municipality Document, 2002:19).

Concerning welfare, the high unemployment rate was highlighted as a main point of concern, with people's living standards decreasing out of season. This leads to an increase in the crime rates, alcohol and drug abuse, with the women and children being adversely affected (Breede River Winelands Municipality Document, 2002:18).

In the Breede River Winelands Document (2002:27), a need was identified for a "development centre", which would serve as a one-stop service centre for business development, employment and the development of skills. Montagu already has such a centre, namely MAG.

4.1.2   Establishing contact

A meeting took place between the researcher and centre manager on 29 January 2001, with the centre manager being supportive, giving the researcher permission to make use of the facilities at MAG, if a need for training was identified. However, negative feedback was received from the centre manager regarding the interest of the local community members in training projects. It was claimed that there was no real interest among the community members to become involved in entrepreneurial training in order to make Xuaka a suitable accommodation centre (more information regarding Xuaka available in 4.1.3). The issue was raised that the community members were expecting some form of payment for the work they would do during the course, not considering the training they were going to receive. It seemed that some form of miscommunication could have taken place between the informant and the community, making it necessary to determine whether these allegations had any truth to them.

The centre manager volunteered to speak to some of the local community members to determine whether they would be interested in entrepreneurial training for the promotion of Xuaka, with them acquiring new skills, which they can apply to generate an income.

4.1.3   Analysing MAG as a resource centre

MAG is situated one kilometre outside the centre of Montagu, close to the neighbourhoods where previously disadvantaged individuals live. The centre had previously been used to present training programmes in the area. It has a number of training halls that could be leased by organisations on a daily basis. It also has several offices, of which some are leased on a monthly basis. During 2001 plans were made to lease more space, but development in this area is slow. The local municipality showed an interest in leasing a large area in the centre, but this has still not materialised in any way, mainly due to structural changes which need to be brought on by MAG with their own funding. The funding was limited at the time of the investigation.

MAG has a computer room with 10 computers and a printer, with one computer linked to the Internet. The local community members can use the computer and Internet facilities at a minimal cost. Typing for the public is done by a staff member of MAG. The public has to pay for this service. Many people make use of the photocopy facility, mainly to copy personal documents.

Different organisations are renting office space in the MAG centre. ABET (Adult Basic Education and Training) is currently renting an office for the year of 2002. They are presenting a computer course which stretches over the year. Classes are presented every week from Monday through to Thursday. The AIDS counselling unit also rented an office for a six-month project during 2002. This was due to finish in August 2002. Although the Zanemphilo community health project also rents office space at MAG, they do not work from the premises, but serve the community in the Montagu area itself. There is a permanent clinic in MAG, where the community members can consult district doctors. It works on a first-come-first-serve basis, and is only open on weekday mornings. The clinic is subsidised by the local government.

Besides the leasing of space and educational facilities, MAG boasts an accommodation centre, Xuaka. The accommodation centre comprises 10 dormitories with altogether 44 beds in them, but 60 people can be accommodated by making use of extra mattresses. Cooking facilities are available in a communal kitchen in the centre, and can be used for large scale cooking.

4.1.3.1 MAG involvement in training programmes
Programmes that have been offered at MAG include *Start your Business, Training of the Trainers, Basic Business Planning, Quilt-making and Screen-printing*. None of these are currently being offered at MAG, although the screen-printing machinery are still on the premises, as it was

donated to MAG. The centre has two industrial sewing machines and an industrial overlocker, which are not used.

4.1.3.1.1   *Summary of business courses offered at MAG*

Table 14 illustrates a summary of the programmes offered at MAG for the year 1999-2000. All the programmes are related to starting up a business, focusing on training and developing entrepreneurs.

Table 14: Summary of business courses offered at MAG during 1999 and 2000

Date	Course	Number of participants
11-15 May 1999	*Start your business*	18
28 June-2 July 1999	*Start your business*	11
2-6 August 1999	*Start your business*	9
16-20 August 1999	*Start your business*	3
5-9 June 2000	*Business workshop Dassie route*	19
17-21 July 2000	*Business training*	2

4.1.3.1.2   *Information obtained from past participants in MAG business course*

Of the 62 participants who had previously attended the business course offered by MAG, and whom the researcher therefore tried to contact, only three could be reached. The other 59 participants could either not be tracked down or the contact telephone numbers were not in use at the time. No other methods were used to try and find these participants. One of the possible reasons (provided by a local informant) for this is the fact that many people get their phones disconnected when seasonal work stops, as they cannot afford to pay their monthly phone bills.

One of the participants interviewed attended the *Dassie Route business course*. The *Dassie Route* was a project started in Montagu and aimed at training the local community members to become local tourist guides in Montagu. This was seen as a way of creating some form of employment for them, and giving tourists the opportunity to experience Montagu and its people in the most natural way. This trainee reports that at present, the information was useless to her as she had nowhere to apply it as the *Dassie Route* never materialised. She did mention that she would still be able to apply the knowledge she gained at the course if she were presented with a business opportunity now.

Another participant, who attended a *Start your business* course, reported that he had not used the information acquired since the course of June 1999. He felt that he still did not have adequate

knowledge to start his own enterprise, and that he did not think he could make a success of a business if he were to start one.

The third participant who attended the *Dassie Route* business course, currently manages a small shop in Montagu which the researcher visited. She does sewing and fabric painting. An external international source provides her with financing, thereby assisting her in the successful running of the business. She said that she does apply some of the knowledge acquired at the course, but that most of the administrative work is done by an outside agent. She did say however, that she would be able to operate on an individual basis if she were to start her own business.

From the information gathered from the MAG diaries, it was clear that a number of people had participated in business training, but that only one person was using the skills she had acquired. The researcher therefore felt that it was necessary to find out whether the community members were in fact interested in receiving entrepreneurial training, as almost none of those who had participated in previous courses seemed to be using their skills. To find out whether an interest existed (see objective 1.3.2), the researcher decided to make use of questionnaires.

4.2   Interest survey

In focusing on objective 1.3.2, it was necessary to determine what the interests of the community members were regarding skills-training projects. On 14 March 2001, 25 questionnaires were completed by respondents with the assistance of the two fieldworkers. Each questionnaire covered four main aspects, namely demographic data, training interests, educational qualifications and specific training interests.

4.2.1   Demographic data

Of the 25 respondents, seventeen were female and eight were male. A possible explanation for the inequality in gender representation, is the fact that the males could have been at work during the day.

The respondents varied in age, with seven being between the ages of 26 and 35. Five were between 18 and 25, six between 46 and 55. Four were between 36 and 45, and three were older than 56. Altogether 16 of the respondents were between 18 and 45. This normally constitutes the workforce, but these respondents were unemployed (see figure 8).
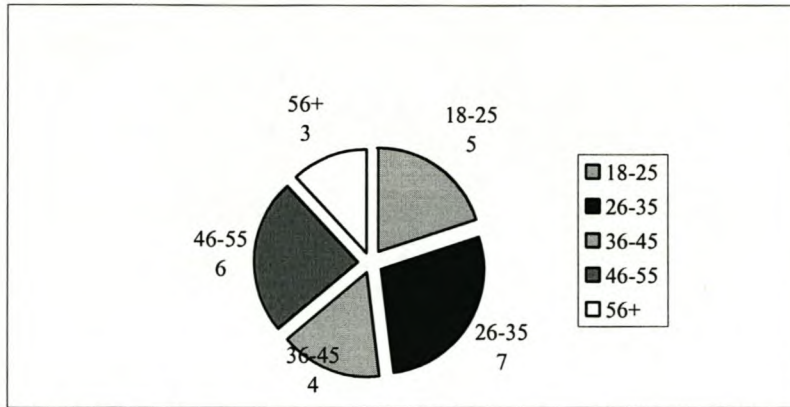
Figure 8: Age distribution

4.2.2   Educational qualifications

Of the 25 respondents, only two had completed Grade 12. Eight had completed Grade 10, and four had finished primary school only. One had completed Grade 11, two Grade 9, six Grade 8, four Grade 6, one Grade 5, and one respondent had not passed Grade 4.

It is clear that the general trend was to leave school at the age of 16, which, by law, is the legal age to start working. The majority of respondents indicated that they had left school after Grade 10. This is represented in figure 9.
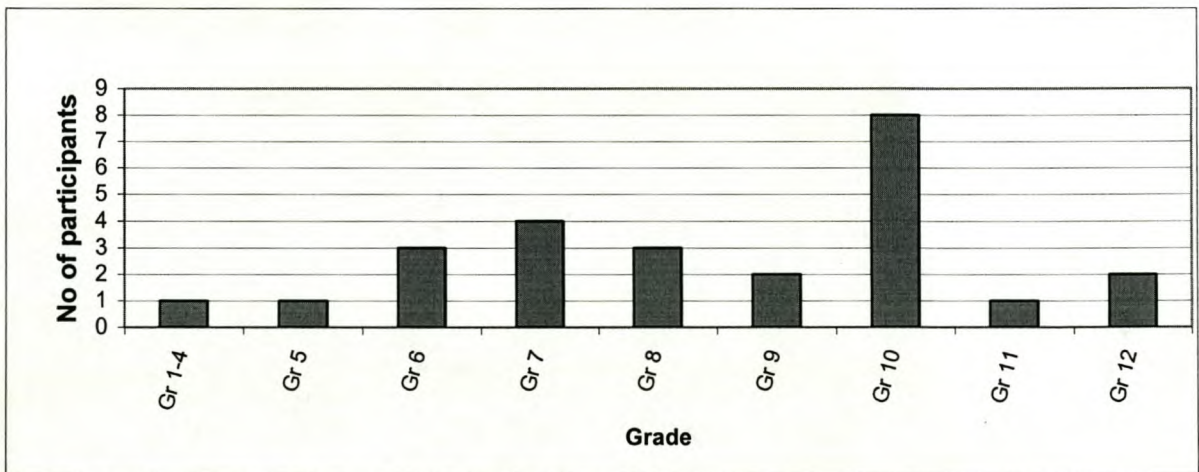
Figure 9: School qualifications of respondents

Only 19 of the 25 respondents had received other training besides school. Six had received training in fruit processing, and between them they had worked a total of 64 years in fruit processing. Other training ranged from training as a painter, domestic work, seamstress, building, barman, educator, to doing courses in flower arranging, English and cooking. A representation of the training can be seen in figure 10.
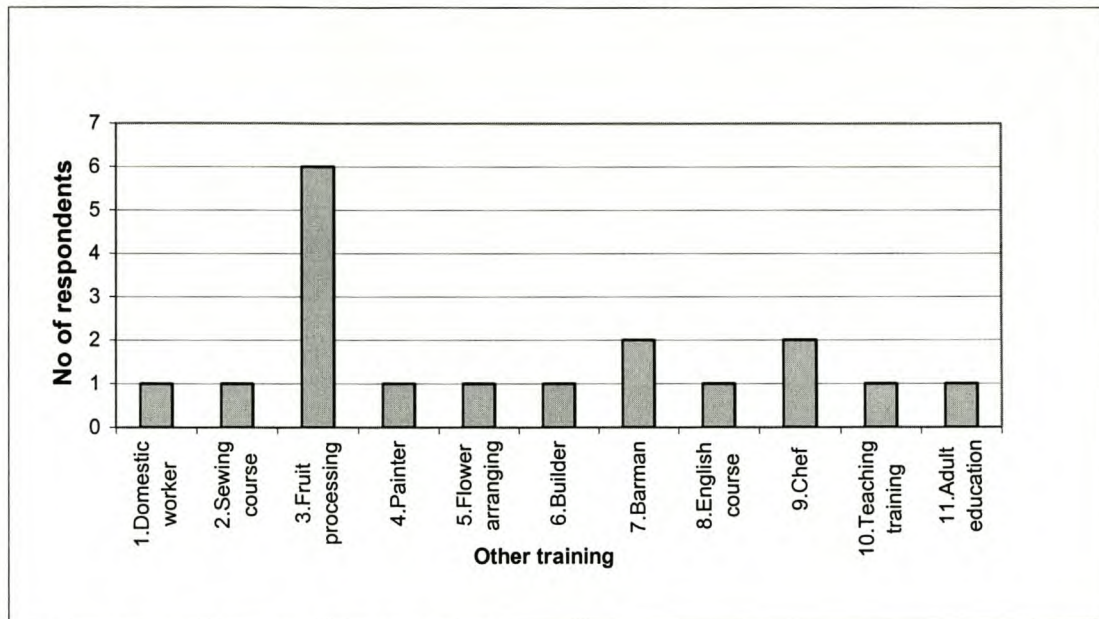
Figure 10: Other types of training received.

4.2.3   Training interests

All 25 respondents indicated the need for training programmes in the community.   Different reasons were given for this, with 16 of the respondents highlighting the problem of high unemployment rates in and around Montagu.   Other reasons given was the need to generate employment, which would lead to income-generation together with acquiring more skills.   They said that there were no programmes taking place at the time of the survey, and that training programmes were needed.

4.2.4   Specific training interests

Respondents were given a choice of six training skills, together with an option to specify a training need not mentioned in the questionnaire.   They could choose more than one skill in which they showed an interest.   Business skills were the most popular choice, with 16 of the 25 respondents indicating that they would like to receive training in it.   There is little employment in Montagu, and if people were to receive business training, they would have some skills to start their own enterprises to generate an income from.   The least popular skill indicated was wood painting, with only four people responding.   Sewing skills drew the interest of 12 respondents, fabric painting 10 respondents, and communication skills six respondents.   Baking and cooking had nine responses. Only three respondents indicated other skills, namely computer training and community work.   A graphic representation showing the various interests, is presented in figure 11.
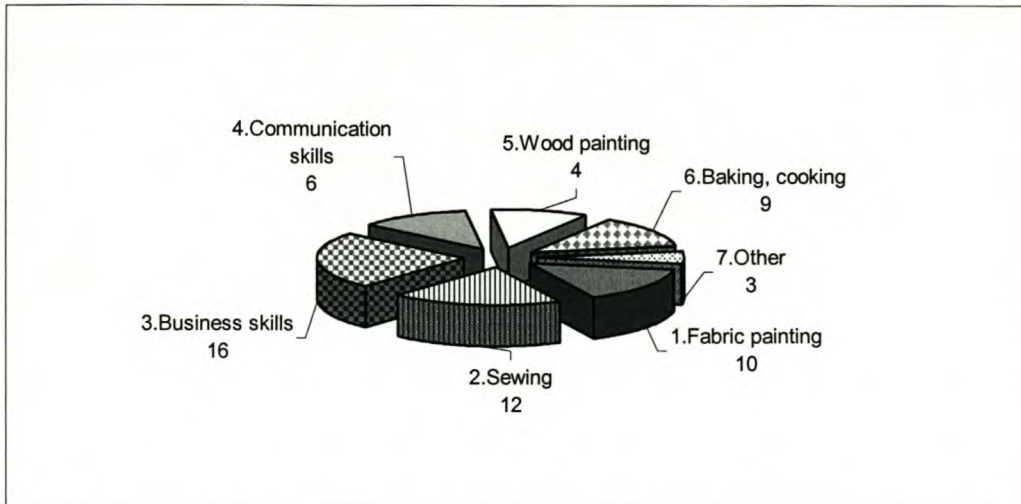
Figure 11: Interest shown in other forms of training

The researcher presented respondents with different options of the possible amount of time they could and would be willing to spend in training. Of the 25 respondents, 12 indicated that they could spend more than a full day per week on training. Four indicated that one day a week would suit them, three said five hours per week, two said two hours per week, and one each for three and four hours per week. Two of the respondents did not give any answer.

Because the majority indicated that they would be willing to spend more than a day on training per week, it can be assumed that they have extra time in which they would like to be productive in some way.
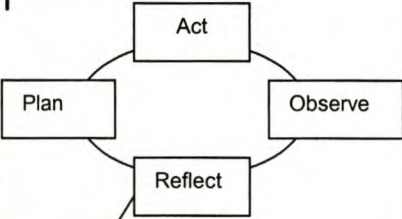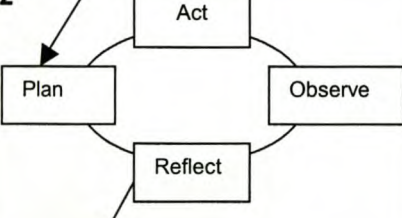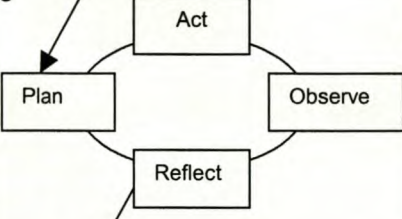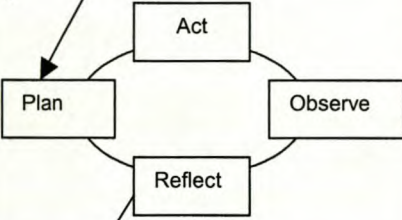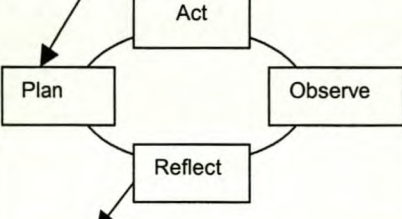
Of the 25 respondents, 15 indicated that they would use the training to generate an income for themselves. The other 10 did not respond. This could be the result of these respondents being unsure of whether they have the ability to use new skills to make money from. It could also be possible that they did not see a great need to generate an income from the skills-training, as they have other income sources to rely on, like a spouse providing an income for the household.

A question was asked regarding possible hobbies that respondents might have and enjoy. The results could not be used for the study, as responses were misleading. The questions might have been misinterpreted, or not properly understood by respondents. Some might have given answers they thought would sound correct.

Once the researcher had collected all the questionnaires and analysed the data, it became clear that there was in fact a great need for training, especially in business and entrepreneurial development. The researcher could therefore develop a programme where possible participants could be trained in entrepreneurial skills.

4.3   Developing and evaluating training projects

In figure 12, the 15 PAR cycles conducted during the non-formal adult education programme are presented graphically. The left column represents the repetition of the PAR cycle. In the right-hand column, each cycle is summarised according to the activities and/or main focus of each. The timeframe of each cycle is also given. According to the graphic cycles, it might appear as if the cycles were of the same duration, but it should be noted that they differed substantially regarding the amount of time that each cycle took place in.

1 Act / Plan / Observe / Reflect	**Cycle 1**: Meetings for information dissemination on the possibilities of skills-training projects (19 March 2001, 28 March 2001).
2 Act / Plan / Observe / Reflect	**Cycle 2**: Identification of respondents' needs regarding skills-training projects to develop a suitable non-formal adult education programme (2-3 April 2001).
3 Act / Plan / Observe / Reflect	**Cycle 3**: Fabric painting to equip participants with a marketable skill and to stimulate creativity (23, 30 April 2001, 7 May 2001).
4 Act / Plan / Observe / Reflect	**Cycle 4**: Beadwork as a marketable skill and pre-test measurement of empowerment status (14 May 2001, 21 May 2001).
5 Act / Plan / Observe / Reflect	**Cycle 5**: The presentation of a five-day business course to integrate with acquired marketable skills (4-8 June 2001, 27 June 2001).

6	**Cycle 6**: Stimulating creativity to produce items to sell (2 July 2001, 9 July 2001).
7	**Cycle 7**: Gathering information regarding marketing outlets in Montagu (6 August 2001).
8	**Cycle 8**: Sewing skills to integrate a variety of skills acquired, promoting creativity and participation (13, 20, 27 August 2001, 3, 10, 17 September 2001
9	**Cycle 9**: Participants choosing and taking part in their own specialised activities (25 September 2001).
10	**Cycle 10**: Producing suncatchers with the aim to sell at markets (9 October 2001).
11	**Cycle 11**: Fabric painting products with the aim to sell them at markets (15 October 2001).
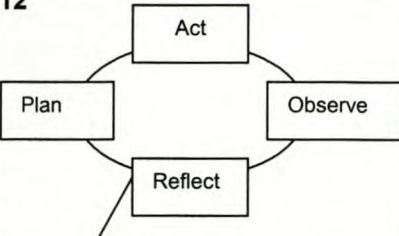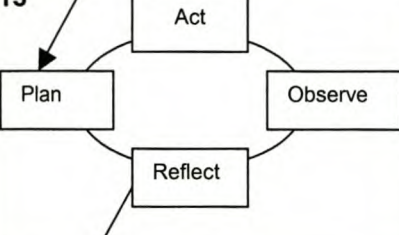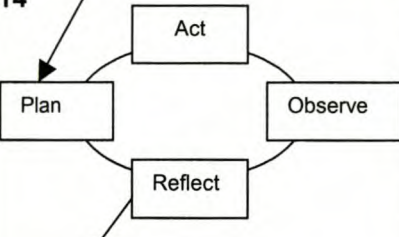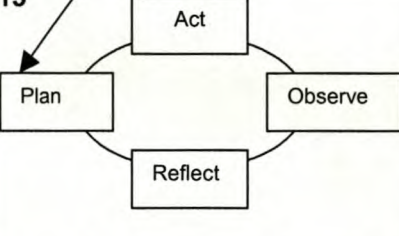
12	**Cycle 12**: Integrating acquired skills at the Montagu festival market day with a follow-up meeting (20-22 October 2001).
13	**Cycle 13**: Selling items at the monthly market and completing the questionnaire on post-empowerment status (26 October 2001, 30 October 2001).
14	**Cycle 14**: Pensioners' market day and subsequent get-together for participants (05 November 2001, 18 November 2001)
15	**Cycle 15**: Conducting final evaluation on a programme (22-24 May 2002).

Figure 12: The 15 PAR cycles that took place from 19 March 2001 to 24 May 2002

During the 15 PAR cycles that took place, different stages can be distinguished. The first two cycles were concerned with the identification of the needs of the community members as to what type of training they would like to receive in the non-formal adult education programme. Once this stage was completed, the cycles moved into an experiential learning phase. This occurred from cycle three through to the end of cycle 11. Participants had the opportunity to learn new handicraft skills to use as a means to generate income. From the experiential stage, the PAR cycles moved into a stage of the integration of skills, aiming towards a common goal. All the skills participants had acquired were combined and implemented to use for the generation of an income. This stage lasted from cycle 12 through to the end of cycle 14. During cycle 15 it was necessary to determine whether the programme had been successful. A questionnaire was used for this evaluation.

Each of these 15 cycles will be discussed in more detail. Each will be discussed in terms of a plan, an action, the observation, and the reflection, followed by a revised plan of action.

4.3.1 **Cycle one: Meetings for information dissemination on the possibilities of skills-training projects (19 March 2001, 28 March 2001)**

4.3.1.1 Planning

The purpose of this cycle was to determine whether community members were interested in attending training, as this would determine whether the training projects would take place. If interest was low, another method would have to be found to attract potential participants, as some participants might respond differently to a variety of involvement methods. Literature states that different incentives apply to different people, where people might want to gain time or money, or they might want to be creative, they might want to improve themselves generally, or they might even want to save time (Robinson, 1995:80). If response on this manner of introduction from the community was low, another method would have to be developed and implemented to reach more people. This took place by means of an information meeting. All respondents attending did so on a voluntary basis, which, as stated by Robinson (1995:1) is a key characteristic of adult education.

A poster announcing two meetings, invited anyone in the community interested in skills-training to attend an information meeting. The literature states that posters are used to attract attention and to obtain possible participants (Knowles, 1980:187). The two meetings were announced for the same day, but at different times (11:00 and 19:30) to ensure that everybody would have the opportunity to attend a meeting that suited them. This poster was faxed through to MAG. Two local facilitators were asked to distribute the posters containing the details about the information meetings in the respective neighbourhoods. This was done one week before the commencement of the meetings that took place on 27 March 2001.

4.3.1.2 Action

Altogether 19 people attended the two meetings. Seven people attended the first meeting and 12 the second. Of the 19 that attended, five were male and 14 female. Literature confirms this unequal distribution, by stating that of those living in poverty, women are dependent on men for some form of income (IFAD, 2002:15). It was thought that the programme might be a driving force for the women to try and generate their own form of income and be less dependent on men. Alcock (1997:145) states that because of the caring role that women have, they are often unable to commit to paid employment, which might lead them to informal employment, like doing sewing work from home to generate an income.

During each meeting, everybody had the opportunity to discuss their feelings regarding the benefits of training skills for themselves and the community, with the focus on the generation of an income. These discussions took place in an open and informal manner, where the researcher would ask a question pertaining to the issue at hand, after which participants had the opportunity to voice their opinion about it.

The participants also had the opportunity to suggest times and dates for the next meeting, where more members of the community could attend if they were interested. This is enforced in the literature by Robinson (1995:2,5), where it is stated that active participation is needed for an active learning process, where adults attempt to achieve a goal or satisfy a need. Adults are also more motivated to learn once they are actively involved in the planning process. Knowles (1980:30) also notes that maturing individuals (adults) tend to be participating individuals. If they are actively involved, the speed of their growth will be so much greater.

4.3.1.3   *Observation*

A problem identified by participants during this cycle is that of a lack of income. During both sessions, the results also clearly showed that most of the participants indicated a positive response to learning more business-orientated skills, but there was also a definite need identified concerning handicraft skills. Participants felt that the combination of business skills with handicraft skills would be most beneficial to them if they wanted to generate an income. This points to participants showing some form of vulnerability like poverty, which makes them look for new outcomes to the problem (Wildemeersch, 1992:157). The latter was more frequent amongst the female participants. Three participants stated their interest in learning computer skills. As Robinson (1995:1,7) states, any adult education programme should be centred around the problems that adults face, and not the subject matter, which is the reason for developing projects which could lead to the generation of an income. It is also stated that the motivational factors of adults with a low educational status tend to be economically-based rather than self-actualisation.

4.3.1.4   *Reflection*

During the open discussion, it became clear that the participants wanted to generate an income for themselves through learning various handicraft skills. The women showed an interest in sewing and baking skills, whereas the men preferred the idea of paintwork. Even though there was this difference between the genders, both wanted training in business skills. The women more readily took part in the discussion than the men, where they would talk about what they thought was important for them to learn. Once the women had voiced their choices, the men started taking part in the discussion. Knowles (1980:96) states that it is important that the researcher allows the participants to state their own interests, and that he/she should never assume what participants might be interested in.

A possible reason for the introvert actions of the men could lie in the fact that they were in the minority during these meetings, and therefore they might have felt that their answers might not be taken seriously. As many of the women spoke about handicraft skills, the men might have envisioned sewing and baking, in which they do not usually partake. As soon as business skills were mentioned though, the men spoke up, showing their interest in it.

Participants also presented the researcher with dates and times for the following meeting. Three different dates were given by them, their reasons being that this would give a variety of people the opportunity to attend at different times, thus allowing people who work during the day or doing night shifts also to attend the meetings.

4.3.1.5 Revised plan

The researcher compiled a list according to the dates and times given by the participants. Participants present during cycle one were asked to add their names to the list and to indicate when they would like to attend the next meeting. Participants were therefore given the opportunity to decide when they wanted to attend the next meeting. This is stated in the literature as one of the characteristics of the transition from pedagogy (education of the child) to andragogy (education of the adult) when adults are able to make their own decisions (Knowles, 1980:45). During the meeting planned next, the researcher wanted to identify what needs the participants had regarding the different skills-training projects.

4.3.2   Cycle two: Identification of respondents' needs regarding skills-training projects to develop a suitable non-formal adult education programme (2-3 April 2001)

4.3.2.1   Planning

During cycle one, participants gave suggestions regarding the times and dates for a follow-up meeting, where a more detailed discussion would be held. The purpose of this follow-up meeting was to identify what skills-training projects the people would like to take part in, together with what time constraints they might have that could limit their participation. The participants suggested three different times over a period of two days for these meetings, namely 2 April 2001 at 19:00 and 3 April 2001 at 11:00 and 15:00. A typed list with the names of the interested individuals, and room to add more names of interested people, was placed at MAG where all community members had access to this. Participants were encouraged to bring friends along to these meetings, which is one of the reasons why more people attended than was indicated on the lists. The lists were completed by those people present during the first information meetings, together with other people adding their names to the lists during the week.

4.3.2.2   Action

A total of 12 people attended these follow-up meetings. For the meeting planned for 2 April, four names were on the list, but six people attended the meeting. Six people attended the meeting on 3 April, even though there were only four names on that list. Nobody attended the second meeting scheduled for 3 April, although there were two names on that list. The reality of more people

attending the meetings was a result of people present at the previous meeting adding their friends' names to the list and then encouraging them to attend the next meeting.

A brief introductory session was held where each participant was asked to introduce him/herself. An open discussion was held to determine what type of training projects the participants would like to start the programme with. Those present was asked to name their interests and what they would like to learn. As Robinson (1995:2) states, all adults come to a new learning situation with their own goals and objectives, which do not necessarily correspond with that of the programme. It should therefore be determined what, if any, the differences are regarding the expectations of the participants.

The different options for training projects were written down by the researcher. Participants were also asked to suggest a suitable time and day of the week in which training could take place. Walkin (1990:16) states that adults respond much better in learning situations if methods that encourage active participation are used.

Participants were asked to partake in filling in a questionnaire (see Addendum 2), to gather biographic information, education received, and hobbies that they have. Once the questionnaires were completed, an open discussion was held, to determine their training interests. The researcher suggested some possible training projects that could be used, but feedback was also asked from the participants, to determine their interests, and what types of training they would like to receive.

The participants were assisted by the researcher on an individual basis in completing the questionnaire. The researcher would ask a question and fill in the response of the participant. Each questionnaire took approximately 10 minutes to complete.

4.3.2.3   *Observation*

Many of the participants knew one another reasonably well, and so communication between them was not a big problem. Even though they were familiar with one another, there was some shyness, especially amongst the younger women present.

The younger participants also tended to sit next to each other. They would not easily speak up on their own accord, but only when asked a direct question as to what their thoughts on the issue might be. This, according to Knowles (1980:43), might indicate that they are still moving into the adult stage as they seem dependent on the researcher, waiting to be asked a question to which they had to provide an answer.

Participants seemed slightly nervous at first concerning the questionnaire, but once the questions were being asked, they started to relax and answered with ease. The younger participants were shy, and took longer to answer the questions in comparison with the older participants. According to Babbie (1998:265), interviewers should communicate a genuine interest in getting to know the participants, and should be relaxed and friendly. This helps the participants to feel comfortable in the presence of the interviewer.

4.3.2.4   *Reflection*

During the open discussion on training interests, the majority of participants in both groups identified fabric painting as a good and useful skill with which to start the programme. Both groups agreed that a Monday night would suit them for this training session, because some of the people had day jobs, or were looking for one.

The group was heterogeneous, as it became clear that participants differed regarding age, schooling background and hobbies. All of them were over the age of 18, with the oldest being 63 years of age. There was only one male present during this stage. All the participants had lived in Montagu all their lives. The educational qualifications ranged from no education at all, to having completed grade 12. According to the literature, adults go through a variety of life cycles, with each cycle having different characteristics as regards jobs, family, society and class, as well as different values and aspirations (Robinson, 1995:23). For this reason, the researcher had to ensure that any programme that was developed had to suit all the participants present, not alienating or excluding any of them. Knowles (1980:53) also comments on groups that are heterogeneous, stating that provision should be made in the programme design to accommodate a variety of adult-learning activities for different subgroups, giving participants flexible choices.

The data gathered from the questionnaire in cycle two are included in a case study report of four of the participants who attended most of the training projects for the full duration of the programme (see *Case studies* in paragraph 4.4). The data of the remaining eight participants can be seen in Addendum 5.

4.3.2.5   *Revised plan*

It was agreed by all present that they would attend skills-training on a Monday evening, from 18:00 until the completion of the training session. As seasonal work was only starting again in November, the participants did not see a problem with attending training over the following few months. Those people who looked after children during the day, could leave the children with their spouses at night to attend the programme. Knowles (1980:141-142) states that courses held during the evening are more convenient for most adults, and that programmes in residential areas generally start approximately at 19:30 allowing participants time to care for their families before attending, and that days at the beginning of the week (like Monday or Tuesday) are more popular

than those closer to the end of the week (like Thursday or Friday). Daines *et al.* (1994:6) state that most adult learning commitment is part-time because of other responsibilities they might have, like family or employment, which prevent them from devoting much time to a skills-training programme.

Cycle three is the start of experiential learning, which is instruction-based learning (Walkin, 1990:32). Participants start to take part in training projects regarding handicraft skills, where they apply their newly gained knowledge and skills.

4.3.3 Cycle three: Fabric painting to equip participants with a marketable skill and to stimulate creativity (23, 30 April 2001, 7 May 2001)

4.3.3.1 Planning

The purpose of cycle three was to introduce fabric painting. The first fabric painting session took place on 23 April 2001, the date suggested by the participants. DARE provided all the materials. An artist, living in Stellenbosch and who does fabric painting, working on calico with PVA paint, acted as a guest facilitator during these training sessions. Knowles (1980:157) states that an instructor used during a programme should have adequate knowledge and should be a successful practitioner of his/her subject or skill.

The second fabric painting session took place on 07 May 2001, once again with the help of the guest facilitator. More materials were bought, and some extra designs were copied onto paper for use by participants.

4.3.3.2 Action

From all those participants who gave an indication that they would like to attend (a total of 12), 11 turned up for the first session, which was a practice session. The researcher introduced the guest facilitator to all participants. The guest facilitator started to explain the basic principles of fabric painting and the colour wheel. He demonstrated how primary colours could be used to create any other colour desired.

Basic painting techniques were practised by all and the guest facilitator created a design for each to paint. If participants wanted to do more, they could create their own designs, or trace a picture from a colouring book which was provided.

During the second session, all 11 participants attended once again. This was a painting session. A brief introduction was given by the guest facilitator to recap what was said at the previous session. Participants then decided on the designs they wanted to trace onto the material to be painted. The material was pre-cut into similar sizes with the idea of making an item at a later stage. Robinson (1995:5-6) states that learning takes place quicker and skills are retained longer

if new techniques that are learnt are applied immediately by participants. The leaning of a new technique should also be reinforced to encourage skill retention.

The concentration span of participants could not be determined, and therefore there was no definite time set aside for this activity during cycle three. Each session started at 18:00, and lasted approximately three hours, including the tea breaks. Knowles (1980:141) indicates that this is the norm for the length of these sessions. Coffee and tea were provided and participants could help themselves to it during the tea breaks. At the end of the sessions, all participants helped to clean the equipment and the venue. The researcher discussed possible items which participants could make out of their painted fabric. Each participant had the choice to leave the painted fabric at MAG to work again on it later, or take it home to work on it there. All the participants took their painted fabric home, and decided to make their own items at home. Knowles (1980:53) and Walkin (1990:16) indicate that this might be the immediacy of application of what they had learnt, with participants wanting to apply their knowledge as soon as possible.

4.3.3.3 Observation

Only one male was present during cycle three, showing a lot of interest in the work, and he could apply those skills demonstrated to him quickly and correctly. This might be because he had just completed grade 12 at the local high school. Knowles (1980:55) indicates that adults who have not been exposed to systematic education for a long period of time, might underestimate their abilities to learn and might lack confidence, compared to those who were still used to systematic education.

The ten women, aged between 16 and 63, were also eager to learn new skills. Literature states that this great age difference indicates that the adults might be experiencing conflicting demands of their life experiences in relation to various social roles simultaneously, which could have an influence on the individual's motivation to learn (Robinson, 1995:44).

The guest facilitator was available to help participants and to answer questions at all times. Everybody could therefore work individually, and could ask questions without others hearing them. Once again the younger participants were shy to ask, but towards the end of the three-hour session, they were more open with their work and their questions regarding it.

Knowles (1980:142) says that the element of fatigue should be taken into consideration, as this can decrease concentration span. A break is therefore suggested for the participants to increase their energy levels. Even though there were not set times for tea breaks, once one person decided to take a break, the pattern would spread and the other participants would also take a break. During the breaks, the older participants would help themselves first to tea or coffee, while the

younger ones continued with their work. The eldest participant also tended to take longer breaks than the others involved.

It seemed that the eldest participant lost interest quickly in what was being done, suggesting a short concentration span. Together with this, sharing seemed to be a problem with the eldest participant, who did not always take note of what the facilitator had to say about sharing of materials with the other participants. Robinson (1995:3) identifies this as resistance, where the participant might not be listening actively in order to protect him/herself, using it as a defence mechanism against possible change.

4.3.3.4   *Reflection*

The eldest participant did not like the painting at all, and therefore wanted to start on another project. Some of the other participants asked for shorter work periods. They also requested materials to practice their painting skills in their own time (on MAG premises). The participants suggested taking turns to prepare snacks at home, which could then be shared at the sessions.

4.3.3.5   *Revised plan*

The participants decided that they wanted to move on to a new skill, namely beadwork. Even though they were ready for new skills-training, they also indicated that they wanted to return to fabric painting at a later stage to give them the opportunity to develop products from their paintwork, and to practice more painting skills. The literature states that newly developed abilities are acquired in their simplest form, which can cause adults to become stuck in their lowest level of potential. For this reason, it is important that adults continue to develop their level of skills to develop larger abilities (Knowles, 1980:30).

4.3.4   Cycle four: Beadwork as a marketable skill and pre-test measurement of empowerment status (14 May 2001, 21 May 2001)

4.3.4.1   *Planning*

The pre-test of the empowerment levels by means of a questionnaire took place during the planning phase of cycle four. All 11 participants present were asked to partake in completing the questionnaire. The guest facilitator assisted in this activity, helping the participants, together with the researcher, on an individual basis to complete the questionnaire. The literature states that helping individuals with the completion of a questionnaire does not leave much room for misunderstandings, and it is one way of making sure that all the questionnaires are completed (Babbie, 1998:276).

The researcher was interested to see if the same participants would attend the new skills-training course, or whether there were any drop-outs as this would be an indication of the level of interest

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among participants. A new skill (beadwork) was being taught to participants, and the researcher wanted to see whether this would have an effect on the behaviour of participants. To present the beadwork training, a second guest facilitator with three years experience in practising beadwork and selling the products at numerous flea markets in the Western Cape area was invited to join the project. The dates set aside for beadwork training, were 14 and 21 May 2001.

4.3.4.2   Action

The guest facilitator brought some items that she had made, to the session to show the participants what the possible end products would look like. The 11 participants had the opportunity to look at the completed items, thus getting an idea of what they were aiming towards.

In the introduction the guest facilitator dealt with purchasing the stock, prices, and areas to buy and sell stock and items. This was followed by a demonstration of making a bracelet, including the skills of how to measure the string used for items, the basic thread method, and a demonstration of the different items that one could make. Amongst the demonstrated products were (during the first session) necklaces and bracelets. During the second session suncatchers were made, as well as broaches, hairclips and earrings.

After the demonstrations by the guest facilitator at both meetings, each participant could decide what he or she wanted to make. Everybody had access to the same beads, and therefore they had to choose carefully which beads they were going to use for the items they were going to produce. This ensured that all managed to make an item which they had planned beforehand.

During the first beadmaking session, three volunteers produced snacks, with another three bringing snacks for the second session. Each volunteer was reimbursed for the money spent on the snacks, which was also an introduction to the budgeting and business side of making products. They were asked to buy the ingredients, to keep the receipts, and then claim back what they had spent on the ingredients.

4.3.4.3   Observation

During the completion of the empowerment questionnaire, a few of the participants had problems understanding some of the concepts referred to. Some of them also had problems with the way in which they had to answer the questions. The researcher and guest facilitator spent time on some of the aspects, explaining the questions to the participants.

All 11 participants were present at both training sessions. These sessions seemed to be much more relaxed with participants talking and asking questions more freely. The products they had made were satisfying to the eye, and the participants seemed very happy with what they had produced. Once everybody had made necklaces, the next item, made during the second meeting,

were suncatchers. Participants seemed surprised as to the speed with which they could produce a product, and its aesthetic value once completed. According to literature (Robinson, 1995:36), this surprise leads to reflection-in-action. This type of reflection causes the participants to consider the event that has taken place and what it might lead to.

The participants got along well with the guest facilitator, and were more at ease to ask for advice on how and what to make. One participant, who was very shy at the start of the skills-training, started bringing examples of beadwork from magazines, which she showed the guest facilitator. One example from a magazine was produced by the guest facilitator to demonstrate its construction. According to the literature this relationship between the researcher and participants is very important, as a strong relationship can have a greater impact on learning than any other single factor (Robinson, 1995:56).

4.3.4.4   Reflection

The researcher noted that people were becoming more relaxed in each other's company, and that they had started asking questions more freely. They also initiated conversation with the facilitators. The participants seemed to become more aware of the value of the products they were making, and it also seemed as if they had started to realise that they could generate an income for themselves. This was particularly clear amongst the older participants who were not at school. A discussion was held with the participants to determine whether they would be interested in taking part in a business course to help them develop entrepreneurial skills.

Completion of each empowerment questionnaire took approximately 20 minutes. Some of the participants seemed to get frustrated with the questions, as it was becoming repetitious, and they did not always understand what was being asked of them. The results of the empowerment questionnaires are all documented in the four individual case studies (see paragraph 4.4).

4.3.4.5   Revised plan

Participants showed an interest in attending a business course, suggesting possible dates that would suit them. Six of the participants were still attending school, and could not attend five days business skills-training. A suggestion was made to accommodate them at a later stage. The remaining five participants were all available to attend a five-day business course, which was to take place at MAG.

An independent facilitator from MAG was approached to do the training, as she had previously received the necessary training regarding *Start your business*. She had already presented the course on various occasions, familiarising her with the syllabus. The participants knew her, as she lived in Montagu, which could have a positive influence on the group interaction and dynamics. She is well informed about the community. She is also a public employee trainer, bringing her into

contact with many different kinds of people, which is supported in the literature (Knowles, 1980:113).

4.3.5 Cycle five: The presentation of a five-day business course to integrate with acquired marketable skills (4-8 June 2001, 27 June 2001)

4.3.5.1 Planning

Because the group attending the business course was small, the researcher wanted to determine what, if any, the change would be in interaction and behaviour. It was also necessary to see if any of the participants would not complete the five-day course. The researcher wanted to determine what concepts posed to be a problem for individuals, so that more attention could be paid to those concepts. It was decided to present the business course in the week of 4 to 8 June 2001.

The ideal number of participants who would be accepted for the business course was 10. This figure was suggested by the independent course facilitator. This meant that there was still room available for five more participants. The facilitator presenting the business course suggested getting more participants to join in the course. She was aware of four other people who were interested in attending the course whom she would contact. A basic requirement was determined for participants who wanted to attend the business course. They needed a minimum level of grade eight education to ensure that they were literate, and able to understand basic mathematical problems.

The course started at 09:00 every morning, finishing at 15:00 for the first four days and at 13:00 on Friday (the last day). A timetable developed by the course facilitator was given to all participants so that they could see what the schedule for the week was like, and what they were going to study. A tea break took place during the morning session, with the next break over lunchtime. Once again the participants prepared snacks for the tea break, and tea and coffee were provided. Lunch was not provided, so participants had to organise their own.

On the fifth day of the business course each participant was asked to complete a short questionnaire (see Addendum 3) regarding the course. The questionnaire formed part of the business course, and therefore was not developed by the researcher. Once the course was completed, a certificate ceremony was planned, where family members and participants could attend to receive their certificates for the business course.

4.3.5.2 Action

Altogether seven participants attended the five-day business course. Five were from the training group, and two new members joined them. All participants attended every scheduled day, and always arrived on time. As the participants were not all familiar with one another and with the

facilitators, each day was started with an icebreaker, in order for participants to get to know one another on a more personal level, and to feel more at ease with each other. This was done in accordance with the literature (Robinson, 1995:114), which suggests that participants should start the day by introducing themselves and getting to know the rest of the group. A new topic was covered every day, with different activities to demonstrate each, allowing the participants to take part in these activities.

The notes regarding each topic were handed out on a day-to-day basis. The facilitator went through the notes with the participants during the coverage of each topic, and if something was not clear, the facilitator explained the concept. The participants could keep the notes handed out to them to use for later reference.

After each session, the day's topic would be discussed, concentrating on the work that was covered, and finding out how the participants felt about what they had acquired. They also had the opportunity to highlight any problems they might have experienced during the day's session.

On the fourth day, a suggestion was made by a participant that the business course should end with a social gathering on the Friday afternoon. Everybody agreed that this would be a good way to end the course, getting everyone together as a group where ideas could be discussed and people could socialise with one another. All participants, the researcher and facilitator attended the function.

The questionnaire (part of the business course) regarding the evaluation of the course was completed on the fifth day. Each participant was given an evaluation form which consisted of several questions. Participants were asked to complete this evaluation form individually. Both the researcher and facilitator were present during this time to provide participants with help if necessary.

There was a break of 19 days before the certificate ceremony was held on 27 June 2001, where family and friends were invited to attend. One of the participants could not attend as he had moved away in the meantime to start a new job. A family member received the certificate in his absence.

4.3.5.3   *Observation*
On the first day participants were reluctant to give their own opinions about statements that had been made. When the researcher or facilitator asked for a suggestion, it took some time before participants volunteered their answers, especially during the initial stages of the course, but this changed towards the end of the course.

Even though all the participants had some form of schooling they experienced difficulty especially with mathematical problems. During the explanation of pricing methods, it was necessary to progress slowly to ensure that everybody understood the concepts.

Because the group was small and because there were two facilitators, participants could be given individual attention. Any problems could therefore be identified immediately.

4.3.5.4 Reflection

The interaction between the participants was good. At the start of the course, participants kept to themselves, but in the end it had seemed a bond had formed between them, and they were taking part in the group activities with enjoyment. All seven of the participants who started the business course continued and finished it. In the literature, it is said that reaching and maintaining personal commitment is enhanced through group interaction and support (Robinson, 1995:41).

A general discussion revealed that the participants enjoyed the business course, and that they felt that they had gained valuable information, which they would be able to use once they started up their own businesses. Some suggested that computer training should be integrated into the course, showing a need for development of technological skills.

When analysing the responses gathered from the business course, it became clear that many of the questions that were asked were not clearly understood by the participants. Answers were not given in full or participants would answer in an irrelevant manner regarding the question asked. Although this was a problem, it seems that the participants had gained valuable information during the course, like marketing skills, how to handle their own finances and how to go about buying stock, and that they would be able to apply this information to a business and in their daily lives. The participants were eager to produce products that they could market and sell to generate an income.

4.3.5.5 Revised plan

It was decided to start the next training session with the main purpose of making, marketing and selling products. Participants, together with the researcher, decided to make gift paper packets in which they could place their items when sold, or to sell as separate items. For this task, all participants were asked to bring along empty boxes of varying sizes to the next session. During this next session they would then be shown how to use these boxes to make paper packets.

4.3.6   **Cycle six: Stimulating creativity to produce items to sell (2 July 2001, 9 July 2001)**

4.3.6.1   Planning

The purpose of the cycle was to produce items that could be marketed and sold to potential customers. In cycle six, two sessions took place. During the first session, the participants were introduced to the making of paper packets, made from gift-wrapping paper, supplied by the facilitator.

Fabric painting was done during the second session. Small pieces of material were painted with the aim to produce a framed item. The guest facilitator was involved once more. The framed items were made to encourage different types of creativity amongst the participants, showing them the variety of products that could be made from material, and how easy it is to make framed items.

The guest facilitator handled both sessions. The participants discussed the making of new products, using limited resources, like time and material. Through this they demonstrated creative ideas.

4.3.6.2   Action

There were 13 participants who attended this session. Even though one of the participants from the original group in cycle three had dropped out as a result of finding employment, three new participants joined in this training session. Two of them attended the business course, and another participant invited the third one. The guest facilitator demonstrated the production of the gift packets, after which all participants made their own boxes by following the steps she was demonstrating. Participants were given the opportunity to create different sizes of gift packets, showing them the innovative use of paper and boxes that are usually available in most households.

During the second session, where fabric painting and framing were done, each participant was given a pre-cut piece of calico material on which they could either draw their own designs, or trace a design which was available.

Once all the designs were painted, participants had to make cardboard frames in which to mount their designs. A demonstration was given by the guest facilitator, after which each participant had to cut out his or her own frame, using a paper cutter. Participants first had to practice this cutting action, as it was a new skill that they acquired, and if not done correctly, could be a dangerous activity where they could injure themselves. Even though they had to practice caution during this exercise, this activity taught them precision work, which could be used to ensure that finishing touches on items were of high standard.

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4.3.6.3   Observation

Four of the participants present during this cycle attended the business course, and it was these four that had brought empty cardboard boxes with them as was requested at the end of cycle five. The participants seemed to enjoy learning a different skill - that of , making use of the boxes - and once the participants were comfortable with the procedure, they started exchanging boxes with one another to create different sizes.   Even though each made their own products, they were willing to help one another, even if it was just providing an extra hand.

Because the participants had worked with the co-facilitator before during the beadwork sessions, they were very comfortable around her. Questions and advice were asked without hesitation.

4.3.6.4   Reflection

The facilitator got the idea that participants did not find much satisfaction while making the gift paper packets, as they continually asked if they could practice other skills, namely continuing with fabric painting and beadwork.

After the fabric painting session, participants felt that they had acquired many different handicraft skills that could be used to produce small items, which could be sold at markets. This is identified in the literature as self-evaluation, where adults gather evidence concerning the progress they are making towards their goals (Knowles, 1980:49). After some discussion, it became clear that they wanted to start integrating all the skills they had acquired with sewing skills. Some of them regarded this as a major step in producing sellable products, and showed excitement at the prospect of working on sewing machines.

4.3.6.5   Revised plan

Participants were asked to identify possible selling outlets in Montagu, to gather information concerning festivals and markets from the information bureau, and to have this information ready for the next meeting, which was in four weeks' time.

Participants suggested that more examples produced from painted fabric should be brought along to the next meeting to expose them to more ideas as to what could be made. It was decided that participants as well as the researcher should think of different creative items that could be made from painted fabric.

4.3.7   **Cycle seven: Gathering information regarding marketing outlets in Montagu (6 August 2001)**

4.3.7.1   Planning

Participants were asked to gather information regarding possible market opportunities as the researcher wanted them to demonstrate their ability to identify different opportunities to earn a living. It was also important to determine whether the same participants had joined in this cycle, and whether any had dropped out.

The selling options of items produced by the participants had to be determined. Different selling outlets had to be identified by participants, from which choices could be made.

The researcher brought along handmade items to stimulate creativity amongst the participants.

4.3.7.2   Action

Nine participants joined in this session from the group of 13 people who were involved in cycle six. Three school-going participants did not attend, and one other participant dropped out as a result of falling pregnant.

At the end of cycle six participants were asked to gather information regarding all the possible selling options in Montagu itself and to present this to the rest of the group at the beginning of cycle seven.

Four possible selling options were identified, namely:
- the annual Montagu festival at the end of October;
- the flea market held on the last Saturday of each month;
- the vendors at the local taxi rank, and
- the pension payout point in one of the neighbourhoods.

Participants also verified the dates of these markets.

The researcher brought along examples of items that she had made, incorporating the techniques learnt thus far, namely fabric painting and beadwork. This gave participants an idea of what they could produce. These items consisted of fabric book-covers, beadwork items and placemats. Participants were asked to give their own ideas as to what could be produced and sold. One participant brought a fabric holder for used plastic bags, and another brought an item made from beads, that was showed in a magazine, as possibilities which could be made.

4.3.7.3   Observation

The intention with the session was to give the participants the opportunity to have discussions on the outlets in Montagu. It was not a very long session, as no skills were taught or practised. It seemed that when the participants were not working on items, they did not take part in the discussions with ease. This was especially true of the younger members of the group. This involvement in the discussion is identified by Knowles (1980:50) as an experiential technique which is also a participatory technique. However, Knowles makes the assumption that the more active the role of the participants, the more they are learning.

None of the participants present knew where the absent participants from cycle six were. It could have been possible that because they were younger participants, they did not want to attend as no skills-training was taking place, and they therefore did not want to be part of the discussion. The four-week break between cycle six and seven occurred and participants were asked to use this time to come up with more creative ideas which might be used in skills-training. This break might also have had an effect on the participants being absent, as they might have forgotten about the date when the programme was about to commence, or they might have lost interest because of being inactive for so long during the break.

4.3.7.4   Reflection

The identification of selling outlets was an incentive to produce items for selling. The participants were ready to move on to the learning of sewing skills as mentioned during the previous cycle. All members present at the meeting showed keen interest in partaking in this planned new skill, which could also possibly lead to income-generation. Robinson (1995:15) says that motivation during any learning experience should be a process of continuous stimulation.

4.3.7.5   Revised plan

The material and equipment needed for sewing had to be organised for the next session. In addition to that, the venue where the course would take place had to be inspected in order to make sure that enough power points were available for the machines. The date scheduled for the start of the sewing course was 13 August 2001.

4.3.8   **Cycle eight: Sewing skills to integrate a variety of acquired skills, promoting creativity and participation (13, 20, 27 August 2001, 3, 10, 17 September 2001)**

4.3.8.1   Planning

A new skill, namely sewing was taught during cycle eight. Skills necessary to produce padded book-covers and placemats were taught. DARE provided all the sewing machines and the fabric to produce these items, as the choice of fabric in Montagu was limited. Prior to the participants

arriving, the room was reorganised to accommodate the machines. Each machine was placed against the wall next to a power point, with two large tables in the middle of the room, where all demonstrations would be carried out, and the fabric was prepared for sewing. It is indicated in literature that the facilities should be flexible and easy to arrange in order to suit the needs of the participants and the activity taking place (Knowles, 1980:163).

4.3.8.2   Action

During the first session, the basic operation of the machines was explained in a step-by-step manner, after which basic stitching and sewing techniques were introduced. Each participant was given a small piece of material on which she had to practice basic sewing skills, until all participants felt comfortable using the machines. Once this was achieved, the making of items started.

The first item the group was taught to make, was a padded book-cover, ideally for use as covers for Bibles. The designing of a pattern was explained, and the choosing of fabric colours. Participants then had to learn how to lay out material, pin on the pattern, and how to cut out the material. All participants had to carry out all these activities on their own, as this was the best way for them to remember the process, and to learn from possible mistakes. Wildemeersch (1992:155) says that any decision-making (in the case of the participants especially regarding choice of material, etc.) that takes place has some form of risk associated with it. Daines *et al.* (1994:6) note that many adults are often reluctant to risk making mistakes (in the case of the participants they might be worried whether they are choosing the correct course or the correct product, etc.) which could therefore inhibit their decision-making skills.

Once all the preparations regarding the pattern and material took place, the participants started sewing the pieces of material together to produce book-covers. Each step was first demonstrated by the researcher, then copied by the participants to ensure that they understood each process and could do it on their own.

During the second session, participants started producing placemats. The same procedure was followed, namely explaining the pattern, cutting it out of the desired and choosing the fabric. During this session, participants established their own work teams without any suggestion from the researcher. Those participants who did not feel totally at ease working on a sewing machine suggested that they would do the layout and cutting of patterns, while those with good sewing skills would do the machine work. This was the start of a group forming, who would work towards selling their items at markets.

In the third session, book-covers and placemats that were not completed during the first two sessions, were finished, after which more of the same were produced. Adaptations were made to book-covers, making different sizes and applying a variety of decorations to the covers.

The researcher introduced a new concept to participants during the fourth session that would help with the development of business skills of the participants. This new concept was *Bake for Profit*, which any of the group members could attend, if they wanted to. The facilitator explained how this training project worked and that participants would have to go to Stellenbosch once every two weeks for the whole day. Emphasis was placed on the business side of the course, where participants would learn how to bake on large scale for profit. It was made clear to participants that they did not have to pay for this course. Participants were given time to think the matter over before deciding whether they would like to take part in this.

4.3.8.3   Observation

The first three sewing sessions were attended by the nine participants who came to the discussion meeting. During the fourth meeting, only eight participants turned up. The reason for the absence of the ninth participant was that her mother had passed away. During the last session, only seven participants were present. The eighth member had to work night shifts at the local hospital and could therefore not attend the evening classes.

The eldest participant, who claimed to do a lot of sewing from home, showed the most difficulty in operating the sewing machine. She also found it difficult to use a pair of scissors, making it hard for her to cut out the patterns. Even though she experienced these problems, she tried to learn the new skill as best she could. Robinson (1995:29) refers to aged people learning new skills by saying that the capacity to learn does not diminish with age, but only the rate of learning. Physiological changes could be a factor in the rate of learning, namely a decline in visual acuity, or the slowing of the physical tempo of work.

Two of the other participants were very comfortable working with the sewing machines, and did most of the sewing work. According to the literature, this could be the result of them having better physical capabilities to carry out the activity, like better eyesight and better hand-eye coordination (Daines *et al.*, 1994:3).

Once again it was the three younger participants who were not interested in sewing. They requested permission to continue working on their beadwork products rather during the next training meeting. They were not hesitant to ask the facilitator whether they could continue with their own work, which indicates that they were not afraid to ask if they could "do their own thing".

Once the book-covers and placemats were completed, participants were very impressed with what they had accomplished, and suggested different ways of applying their skills, especially combining it with more decorating techniques that could be employed regarding the items.

While establishing the work team, those who were comfortable with working with the sewing machines did not show any objection to doing the machine work while others were cutting out the material. All the items that were produced as a team belonged to the group. This prevented participants from associating with a specific item, which could prevent disappointment is that person's item did not sell.

4.3.8.4   Reflection

During reflection, the positive feedback from some of the participants showed that they were getting orders for the products that they had made, giving an indication of the type of market that existed among the people in their neighbourhoods. This provided an incentive for them to produce products that they now realised could generate an income. Literature indicates that this pointed to the good quality of the items, as quality is the response to the needs of clients (Houben, 1992:137).

The three younger participants did not show much interest in sewing, and it was therefore decided that the next session would combine all skills acquired thus far, and each participant could then decide which resources they preferred working with, and which skills they would employ. The literature states that adults see themselves as self-directing and independent individuals, and if treated like children, they will resist and resent being placed in certain situations (Robinson, 1995:14). For this reason, each participant was given the opportunity to decide which activity she wanted to partake in.

4.3.8.5   Revised plan

The facilitator had to determine how many participants respectively wanted to sew, do beadwork, or paint to ensure that the correct amount of resources were brought along to the next session. Each participant was asked what her preference was, and a list was compiled according to this, in order for the facilitator to be able to get hold of all the necessary resources and to be well prepared for the next session.

4. 3. 9   Cycle nine: Participants choosing and taking part in their own specialised activities (25 September 2001)

4.3.9.1   Planning

Participants indicated that they wanted to take part in their own specialised activities. The number of participants who attended, were observed, making sure whether there were any drop-outs at

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that stage. The researcher was interested to see the different choices participants made in terms of activities, and whether any chosen activity suited the level of competence of the participant who had chosen it. Wildemeersch (1992:157) says that flexibility should be taken into consideration during a programme, and this flexibility should be implemented gradually. This is in accordance with individualised learning routes. Knowles (1980:91) adds to this by saying that interest will vary according to particular activities, with influencing factors ranging from gender and race, as well as the size and type of the community.

At the end of cycle eight, each participant could decide which activity she would like to take part in. They had a choice between beadwork, sewing, painting, or making gift bags. All items made had to be priced for the market where they would be sold. The researcher therefore guided the participants in pricing the items according to the principles they had learnt during the business course. Pricing strategies of different items were discussed among the group to refresh their memories regarding the business course, and to help those participants who did not attend the course. Different aspects were considered in pricing items, like the labour involved, material cost, and the percentage profit.

4.3.9.2   Action

Seven participants were present during this session, of which four had also attended the business course. Four participants took part in sewing, while the three youngest participants did beadwork. Those who did sewing, integrated some of the fabric painting items into their work, converting the painted article into a practical and useable item, like a pillowcase or book-cover. Beads were also used for decoration on the sewed items to give it more character.

Final products were at that stage being produced for the Montagu festival market, where the participants would be exhibiting and selling their goods. Sets of placemats, book-covers and beadwork items were being produced.

4.3.9.3   Observation

This was the perfect opportunity to see which participant enjoyed which activity. Even though different activities took place, participants still interacted with one another, admiring the items being produced by their fellow group members, and giving input concerning decorations and finishing ideas. The two most popular activities were sewing and beadwork.

Pricing of items did not present many problems. All the participants took part in the exercise, providing input as to how they thought the items should be priced. As three of the participants were not totally comfortable with the pricing process, they were slightly hesitant in the beginning. The four participants who had attended the business course, then explained the basic pricing principles to them. Once they understood the pricing concept, they took part in the process.

Participants took part in their chosen activities, but two participants changed from doing beadwork to sewing, and vice versa, halfway through the session. This shift was not suggested by the researcher, which indicated that participants were taking initiative in the production process, and wanted some variety in their work.

4.3.9.4   Reflection

Participants wanted to produce a greater number of suncatchers to sell at markets and to friends in their neighbourhoods. Good public feedback was received from friends and family regarding the items that were sold, who mostly favoured suncatchers and covers for Bibles.

One participant dropped out during this cycle. No reasons were offered by the other participants for this, and the researcher assumed that the participant (who was still at school) might have been kept busy with school work). The researcher took note of which activity each participant chose to take part in. The three participants who took part in the beadwork were all young and still at school. The other participants were the eldest four in the group. Each participant was observed according to whether the skill she had chosen, suited her level of competence. The researcher noted that those participants who took part in the beadwork, experienced satisfaction regarding the items they had produced sooner than those taking part in sewing, as the beadwork items could be produced at a faster rate than items produced by sewing. The participants who participated in the sewing activities also had to put more energy and time into their products. These participants also showed more patience in their work, as the process of producing items by sewing took more time.

4.3.9.5   Revised plan

The participants decided that the next cycle would be dedicated to producing only suncatchers, as most of the sewing work for the first market had been completed, and suncatchers were easy and fast to make, with a high aesthetic value.

4.3.10   Cycle 10: Producing suncatchers with the aim to sell at markets (9 October 2001)

4.3.10.1   Planning

The items produced by the participants needed to be inspected by them and by the researcher to determine whether the items were suitable to be put on display for sale. After the inspection, an open discussion was held regarding what the participants thought of the quality of the items, and whether they were fit to be sold at markets. The question posed to the participants was whether they would be prepared to buy the items, and whether they would pay the price asked for it. Literature identifies this as *formative evaluation*, where the evaluation is conducted during the

programme to provide adequate feedback to participants regarding the project to ensure that appropriate changes could be made if necessary (Robinson, 1995:119).

The making of suncatchers was the main purpose of this session. The guest facilitator (as in paragraph 4.3.4.1) was asked to join in because of her expertise. Beads and accessories for these catchers were displayed for all participants to view. DARE provided all the materials to produce suncatchers.

4.3.10.2   Action

Four participants joined the cycle. The participants decided to work in groups of two, creating new ideas, and giving one another support. They applied the skills acquired during cycle four, namely doing beadwork. They discussed the type of suncatcher they were going to make, what design to use, and proceeded to choose the beads that they needed for their design. Because they worked in groups, they could produce more suncatchers with different patterns.

4.3.10.3   Observation

There was less personal attachment to each product made because participants worked in groups. A person could not identify a product as only belonging to her. It now belonged to the group, and when all products were placed together, the group members could sense some form of group achievement. They admired one another's items, giving positive feedback to one other. Another positive reason for choosing group work, was that the participants could not compete with one another when making their items. The literature states that conditions that promote helpfulness instead of rivalry, should be chosen during adult education (Knowles, 1980:31).

4.3.10.4   Reflection

The participants had a common goal, namely exhibiting and selling at the flea market. Two of the participants that did not attend this cycle were scholars, and during this time they had expressed their concern regarding schoolwork and upcoming exams, for which they had to study. The third participant had her own sewing business, and was possibly too busy to attend further sessions.

During the group discussion on whether the items were suitable for selling, the participants rated their items highly, saying that they were comfortable and happy with what they had produced. The researcher also felt that the items were sellable, and that the quality of the items was high. Flaws were noted in two of the items, and these items were taken back to the respective tables and fixed to match the quality of the other items.

Even though the group was now rather small, as it was reduced to four participants, these participants were still very eager to continue with their work, and were getting themselves ready to

exhibit at the Montagu festival market, which was less than two weeks away. They suggested making a few more painted items, as the selling stock was low.

One of the participants decided to join the *Bake for Profit* course that was taking place in Stellenbosch. She was eager to take part, and motivated by what she was going to learn. She had already attended one lecture in Stellenbosch, and showed enthusiasm for the course.

4.3.10.5   Revised plan

All participants decided to do paint work during the next session before the market day, and to finish off any products that might still need some corrections or to add the final touches to items. Pricing of the new products had to take place at the next meeting.

4.3.11   **Cycle 11: Fabric painting products with the aim to sell them at markets (15 October 2001)**

4.3.11.1   Planning

The resources needed for this session, were calico material and paint. As there was still paint stock left over from previous sessions, only two colours had to be bought, along with the fabric. Participants decide what they wanted to do with the painted product, before the painting activity could start.

4.3.11.2   Action

Three participants attended this session. Basic paint techniques were again demonstrated to the participants to refresh their memories as regards this activity. Once this was done, the participants decided on what items they wanted to make out of the painted fabric, after each cut the correct size material she needed. Designs were either drawn or copied onto the material, which was then painted and left to dry. Two of the three participants made pillowcases, while the third made covers for Bibles and a set of placemats.

Because fabric paint does not dry immediately, participants had the opportunity to come and work on the items in their own time during the course of the week. No supervision would be present, but they could decide on a day and time that suited everyone to finish their items as a group.

Prices of the goods that were going to be sold at the Montagu festival market, were determined at this session, once again with the guidance of the researcher. Basic guidelines, in accordance with the business course and to which the participants had to adhere, were set up. The completed items were costed and priced. Items that still had to be finished during the week, would be priced by the participants themselves.

4.3.11.3 Observation

The eldest participant from cycle 10 did not join this session. From informal conversation with the other three group members, it was mentioned that she did not enjoy fabric painting, and because there was no other skill practised that session, she might have decided to stay away as her interests were not seen to.

The participants present discussed the upcoming Montagu festival market. They prepared their own time schedule and gathered information concerning times of exhibition, cost of hiring tables, and where to hire these tables. The profit structure for participants was determined according to the mark-up of products, and those who ran the stall.

None of those present seemed to mind the absence of the fourth participant. They mentioned that she was bossy, took over in situations, and that they preferred working without her.

4.3.11.4 Reflection

The three participants worked well together as a group, furnishing ideas and suggestions for the market. Each had an activity that they had to carry out on the market day. They also felt that if the fourth participant wanted to partake in the selling, she herself had to make the effort to contact them to get details of the market.

The facilitator was not going to be present at the market, and therefore the participants had to take responsibility of running the stall. They had to ensure that the products were exhibited in a presentable manner and that the finances were dealt with in a responsible manner. A marking sheet for the items sold was designed for the participants so that they could monitor all items that were sold, ensuring that no items or money disappeared unaccounted for.

4.3.11.5 Revised plan

Each participant was given an individual responsibility which they had to see to at the Montagu festival market. All participants looked forward to the market day, and felt that they were well prepared for this responsibility. Knowles (1980:31) highlights the fact that if no responsibility is given to adults their development process may be slow, as the researcher then makes all the decisions for them. Adults should therefore be given responsibilities to help the development process, in this case to develop their skills.

Once all the participants had acquired a variety of skills, from handicraft to business-orientated skills, they were afforded with the opportunity to integrate these skills to work towards achieving the goal of entrepreneurial development.

4.3.12   **Cycle 12: Integrating acquired skills at the Montagu festival market day with a follow-up meeting (20-22 October 2001)**

4.3.12.1   Planning

This was the first market day ever in which the participants took part. The researcher did not attend, and therefore had to rely on the participants regarding proceedings at the market, and especially at the stall. The researcher wanted to see whether participants could organise themselves for and on the market day without being accompanied by the researcher. Photographs were taken by participants of their display table for the researcher to use as reference. The interest of participants towards the market day was observed during a conversation. Knowles (1980:57) indicates that participants should take on a share of responsibility for the planning phase and the operation of the learning experience. This increases their level of commitment towards learning.

As mentioned in cycle 11, all preparations for the market day had been done by the participants themselves. Only the three participants who were present during the previous session, attended to the stall. The table was paid for, and the products were displayed for all potential customers to see.

At the market, a follow-up meeting was arranged to take place on 22 October 2001, to discuss sales and the participants' experience during the selling of the items. It was also necessary to decide what other products had to be produced for the end-of-the-month market that was coming up on 26 October 2001. The three participants at the market were asked to inform the fourth of the meeting, as well as the time that it was due to take place. At the meeting, stocktaking would take place of those items that were sold.

As the researcher was not present at the market, one of the participants had to be contacted after the market to find out which material were needed to replenish the stock at the next meeting, in preparation for the monthly meeting.

4.3.12.2   Action

Three participants were present to help set up the table and the display at the festival market. The participants took photographs of their table for later reference. Each had the opportunity to work with customers and to handle money. Participants took turns in manning the table, getting the opportunity of running a business and working with customers and money.

The researcher contacted one of the participants after the market to determine what materials were needed. More beads were needed to make necklaces and suncatchers. Some material was

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still left to make more book-covers and tablemats to sell at the monthly market. The extra material was used to produce more items at the follow-up meeting to sell at the monthly market.

The follow-up meeting took place at the suggested date and time. The fourth participant arrived late, as a result of not being properly informed of the time the meeting was due to commence. More beaded items were produced for the monthly fleamarket, and two of the participants chose to paint more items. The participants still worked together as a group instead of individually.

4.3.12.3   Observation

Three of the four participants attended the market day. The eldest was not present, and did not give a reason for this. According to Robinson (1995:27) this type of behaviour can be seen in especially late adulthood, where the elderly might react to new situations with alienation, powerlessness, isolation or meaninglessness. Feedback from the three other participants indicated that they enjoyed their first day of selling at the market, and they experienced different market preferences of customers. The market itself was not very busy because of other festival activities taking place elsewhere and distracting potential customers from viewing and purchasing items.

The fourth participant had knowledge of the follow-up meeting, but did not know that is was scheduled for earlier that session meeting. It was, however, clear to the researcher that she had thought it would be held at the same time as general meetings. Although she was not very happy about being late, and there seemed to be slight tension between her and the other three participants, she nevertheless still helped them make more items.

4.3.12.4   Reflection

Overall, the learning experience was a positive one for those who participated in the market day. When the fourth participant realised this, she was determined to attend the next market day, which was taking place in four days' time. Another meeting had to be scheduled before the market day to ensure that the items were ready for sale, and to go over last-minute arrangements.

It was noted that the participants could organise and manage a market by themselves, without the immediate help of the researcher. Looking at the photographs taken by the participants, the researcher could see that the items displayed by the participants were pleasing to the eye.

4.3.12.5   Revised plan

The revised plan of action included selling items at a monthly market. A meeting was scheduled for the evening before the next monthly market day to discuss more pricing strategies for new products, possible displays of products and how to deal with potential customers in a pleasant manner.

4.3.13   **Cycle 13: Selling items at the monthly market and completing the questionnaire on post-empowerment status (26 October 2001, 30 October 2001)**

4.3.13.1   Planning

A meeting took place the evening before the next monthly market, to ensure that all participants were informed of the time and venue where the selling would take place, and to check on the items which were to be sold. Pricing strategies and consumer relations were discussed, together with different ways of displaying items.

The researcher was present during the monthly market day, and used the time to observe the participants, looking at their interaction with customers, how they promoted their stall, and how they handled finances. The success of the sales at the monthly market had to be determined. This was done by comparing the sales to that of the previous market day.

On the monthly market day, the facilitator fetched the participants at a designated point near their homes. At the meeting the night before, each participant had been given a specific responsibility regarding market day. Therefore, participants knew beforehand what they had to bring with, or what her duty was in setting up the stall.

After the monthly market day, participants attended another meeting where they were asked to complete the post-empowerment questionnaire. They also received their share of the previous two market sales.

4.3.13.2   Action

The four participants from cycle 10 were present during cycle 13. At the meeting before the market day, all four participants discussed their responsibilities at the monthly market. Participants worked together as a group to price the new items, only asking for the researcher's guidance towards the end of the meeting, merely to check if the pricing had been done correctly. Robinson (1995:116) refers to co-operative learning, which requires face-to-face interaction between group members, ranging from discussing topics, talking about relevant issues and problem-solving. This would primarily mean working together as a group and not competing with each other.

On the market day, four participants set up the stall, with the researcher only commenting after everything had been set up or when asked for advice. Selling shifts were determined by the participants themselves, with two members being on duty at all times. This helped minimise possible mistakes, and made it possible for members to support each other.

The researcher was present during most of the morning, only giving advice when asked for it. The participants were in charge of the stall, and the researcher stayed in the background, not wanting to interfere with the selling process.

The participants started packing up after lunchtime, when the flow of customers started to decline. One participant was appointed to take home the extra stock until the next meeting. The researcher took the money to ensure that it would not get lost or stolen and to calculate each participant's share.

At the meeting following the monthly market day, all four participants were present. Each participant's share of money was handed to her in a bank bag, and the way each one's share had been calculated, was explained. Three of the four participants received identical amounts, while the fourth received slightly less because of non-attendance at the first market. The researcher was prepared to answer any queries regarding the amounts that were allocated.

Each individual was then taken aside to fill in the empowerment questionnaire with the help of the researcher. If questions were not fully understood, the researcher explained the meaning to ensure that participants understood what was asked of them.

4.3.13.3 Observation

At the meeting the night before the market day, all the participants seemed excited to be taking part once again, especially the eldest participant who had not been present at the last market day. Some of the items had to be priced, which was done by the participants. They did not seem to have any trouble taking part in the pricing activity. Walkin (1990:1) sees the excitement as a motivated experience, where gains are related to needs satisfaction, in this case, receiving money.

On the market day itself it was clear that only one of the participants seemed to be able to communicate clearly with the customers. The other three seemed shy and almost afraid to communicate and to be of help. When these three did communicate, they spoke softly and did not maintain eye contact with the customers, taking on a submissive stance.

More items were sold at this monthly market than at the festival market. The beadwork and suncatchers were very popular, and most of this stock was sold.

The eldest participant did not seem to enjoy being at the market, possibly because of physical limitations, like her getting tired quickly, or it being too hot outside. Despite her discomfort, she stayed until right at the end of the market day, and even helped the others to pack up.

Overall, the participants seemed to enjoyed being part of the market day and having the opportunity to sell their items. They were pleased with the amount of beadwork that was sold and felt that beadwork would be a good focus point when selling items to the public.

None of the participants discussed their share of the money during the meeting, neither with one another nor with the researcher. The filling in of the post-empowerment questionnaire did not prove to be very difficult, with the participants being more comfortable than during the first session a few months before.

4.3.13.4   Reflection

All the skills and knowledge acquired by the participants were applied to the needs of the clients when making the items. The high number of items sold was a good indicator of what consumers wanted, and it served as a good motivational force for the participants who produced and sold items. Participants received their share of the money after the market day. According to Houben (1992:142) being awarded in some way can also be linked to the quality of the items that had been made.

The results gathered from the questionnaire on the post-empowerment status of the participants are discussed in the case studies (see paragraph 4.4) and compared to the results from the pre-empowerment questionnaire.

4.3.13.5   Revised plan

A date was set to produce a few more items, concentrating mostly on beadwork to fill up the depleted stock from the previous market days. These items would be sold at the pensioners' payout point which took place on a monthly basis. The sale of items at the payout point was not an organised market day, but the participants decided that they would like to exhibit their items on the day that payouts took place.

Participants suggested a farewell social gathering to follow the last market day, and the researcher offered to look for a suitable venue.

4.3.14   Cycle 14: Pensioners' market day and subsequent get-together for participants (5 November 2001, 18 November 2001)

4.3.14.1   Planning

A meeting was held prior to the pensioners' market day. During this meeting, discussions were held regarding the benefits of selling at the pensioners' payout point. The benefits of selling in this way were that pensioners would receive money, and it would be the right time to buy Christmas presents. More items had to be made for this pensioners' market.

The researcher was present at the pensioners' market day, and observed the interaction of participants with customers, and interaction among the participants. If a participant was absent, a note was made of this as well as possible reasons for the absence. It had to be determined whether participants were interested in continuing with the selling of items, and also whether they would continue working as a team.

At the previous market, participants suggested a social gathering to end the programme as a group. The researcher chose the caravan park as a venue. It was a neutral area, away from MAG, and places they might have been used to, or places that might influence them in a negative manner. Participants were asked to provide their own meat for the occasion. DARE provided drinks, salad and rolls.

4.3.14.2   Action

At the meeting prior to the pensioners' market, four participants were present. The sales of the previous market day were discussed to see whether prices were reasonable, and what the customers preferred buying. A few extra items, like suncatchers and covers for Bibles, had to be produced for the pensioners' market.

At the pensioners' market, participants set up their stall at the payout point. As it was not a designated market day, they were the only people selling items. Only three of the four participants arrived to help with the selling. The fourth (eldest) was not present and did not excuse herself either.

Only three participants attended the social gathering. The fourth (eldest) again was not present. The participants made the salad, and they had her their own meat as requested. Making the fire was a joint effort between the group members, the researcher, and the manager of the caravan park.

At the social gathering, the researcher provided additional information concerning buying of stock in other areas of Cape Town, and how to go about ordering it, as well as making sure it would get to Montagu. Contact numbers of people in Stellenbosch who could provide them with beads, were given to participants. An open and informal discussion was also held between the researcher and participants, regarding the past year and all the events that had occurred. The participants had the opportunity to express how they felt about what they had acquired, and how they were going to apply their new skills in their everyday lives. All of them stated that they would like to continue making and selling items that would help generate an income for them.

4.3.14.3   Observation

An open discussion was held regarding all the previous sales that took place at the market days. All participants gave their input especially as far as their experiences regarding market day and the selling of their items were concerned.

The fourth participant did not turn up at the market day. One of the other participants said that she had made an excuse, saying that she was going away for a few days. Even though this was apparently what she had said, the other three participants were sceptical about her really being away. They thought that she was just trying to get out of selling.

When the researcher observed the participants at the pensioners' market day, they seemed more relaxed and more at ease than at the previous monthly market day or at the festival, possibly because they were in their own neighbourhood, and they knew most of the people in that area, and possibly also because of the experience they had gained by participating in two markets previously.

Sales were very poor at the pensioners' market. Many of the residents came to have a look at the products, but very few actually bought any items. Because the customers were familiar with the participants, some asked if they could take an item and pay for it during the next week. The participants denied this request, as they believed they would not receive the money for the product.

At the social gathering, none of the participants present seemed to mind that one of the group members was not at the farewell. Some of them expressed their relief in not having the fourth member around. The fourth member was seen as a threat to a successful business, as they felt that she was only interested in making products to sell privately, or to keep for herself, while still making use of the resources provided to all. They felt that she was not interested in working with the group, and therefore they saw no need to include her in their activities.

The participants were very relaxed at the farewell and obviously felt at ease. They spoke about how they would like to continue doing what they had acquired, saying they wanted to produce more items for sale. They also felt that they would be able to work well together as a group

4.3.14.4   Reflection

One of the reasons for the poor selling rate at the payout point could have been the fact that pensioners do not receive their payouts in the form of cash, so they were not able to purchase items. Because they are pensioners, they generally live on a very tight budget and can therefore not afford to just buy any items at random.

During the discussions held between the participants and the researcher, it was revealed that the remaining three participants seemed dedicated to the sessions and what they had acquired. They started taking part in the sessions right at the beginning of the year, never missing any. They showed a keen interest in learning new skills, and applying this knowledge when making items.

One of the three participants showed a lot of potential to make a success of what she had acquired. She was the only person who took part in the *Bake for Profit* course offered at Stellenbosch. She showed lots of enthusiasm for what she was making and producing, and she was the only participant who conversed easily with the customers. She had confidence in what she was doing and enjoyed trying out new ideas. Although the other participants also had the opportunity to take part as it was fully paid for, none of them were interested.

The social gathering was the last time that participants and the researcher were together before a break of five months. It was decided that one sewing machine would be left at MAG for participants to use. They had to make their own arrangements with the centre's manager as to when they could use this machine. It was argued that this way, there would be little excuse for them not to continue producing items that they could sell.

4.3.14.5   Revised plan

A last questionnaire had to be conducted by the researcher to evaluate the success of the programme (see Addendum 4). The researcher therefore had to return to Montagu after five months to conduct this questionnaire with the remaining four participants, and to collect the sewing machine which was left at MAG for the participants to use in the interim period.

4.3.15   Cycle 15: Conducting a final evaluation of the programme (22-24 May 2002)

4.3.15.1   Planning

The purpose of cycle 15 was to conduct a final evaluation of the programme by means of a questionnaire to determine whether the programme had been successful. This is called *summative evaluation* in the literature. A summative evaluation is usually conducted once the programme has been completed, to judge its effectiveness. If changes are necessary, these are also based on the results of this evaluation (Robinson, 1995:119).

The researcher returned to Montagu five months after the completion of the programme. The final questionnaire had to be completed by the four remaining participants who had remained with the programme from start to finish. It was necessary to determine whether they had applied the skills they had acquired without the help and support of the researcher, especially regarding entrepreneurial skills-training in the absence of a scheduled training programme. The biggest issue was to determine whether the researcher was needed at all times to facilitate the learning of

skills to generate an income, or whether participants could continue on their own once they had acquired the skills.

The questionnaire is explained in more detail in 3.4.3. The questionnaire is divided into five broad sections, covering different aspects of the non-formal adult education programme that took place. Firstly, information was gathered regarding the researcher, concentrating on personality traits, enthusiasm for the programme and helpfulness. Secondly, attention was paid to the training skills the participants had acquired. Questions revolved around items made for personal sale, and reasons behind possibly not using this knowledge. The third section gathered information on the products that had been made. This could only be answered if the participants in fact were using their knowledge to sell their products. Information was also gathered regarding marketing strategies, clientele and stock. Questions were based on what participants had acquired during the business course. The fourth section concentrated briefly on the finances, pricing of products and payment methods involved. Lastly, information was gathered concerning the interests of the participants and how they experienced the group atmosphere.

4.3.15.2   Action

Before the researcher arrived in Montagu, she tried to contact all four participants, but could only get hold of two by phone. Once there, the researcher went straight to MAG to determine whether anything had changed, and what programmes were being offered there.

The researcher needed an assistant to help locate the four participants. She relied on the help of one of the earlier participants who had to leave the group because he had found employment in a neighbouring town. He knew exactly where the participants lived, and so helped the researcher to locate them.

Two participants knew of the researcher's arrival, as they were contacted beforehand. The other two could not be contacted telephonically at that time, and could therefore not be informed of the visit. When the researcher arrived at the homes of the uninformed participants, both were present and rather surprised to see the researcher. The questionnaire was explained to each participant, as well as its contents and its functional use to the facilitator. Each questionnaire took approximately 15 minutes to complete. After completion of the questionnaire, an informal conversation was held with each participant, concerning what had been happening during the past five months and possible entrepreneurial development which had taken place. The researcher documented the information from this open discussion as additional information. Literature emphasises that questionnaires can be limiting when gathering data, as the researcher cannot effectively predict any problems, causes of these problems and ways in which to solve them. It is therefore important that a questionnaire is followed by an interview (Knowles, 1980:103).

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4.3.15.3 Observation

The first noticeable difference at MAG was that a new manager had been appointed three months earlier. A new six-month computer course was also being presented at the centre. Once at MAG, the facilitator collected the sewing machine, which had been used once by a participant since the last session five months ago.

The informal conversations with participants revealed that there was a lot of tension between the participants. At that stage the four participants had no contact with each other. They accused one of the participants of taking stock and another of taking money. All participants pointed fingers and put the blame on each other. There was therefore no trust between the participants, and they did not want to communicate with one another anymore. It was difficult to determine where the stock had gone, but it seemed that all the participants had some of the stock with them.

4.3.15.4 Reflection

No participation in market days or group selling activities took place once the researcher had left the group five months earlier. Everything seemed to have come to a standstill, with participants either not showing enough interest in the programme to continue, or not having the ability to continue even if they wanted to. The fact that there was a long period in which the participants were not influenced or driven by the researcher, might have had a negative effect on the programme. This absence of the support figure might have been the cause of the participants not selling anything when left to their own resources.

As each participant had money from the previous markets to buy stock, it should have enabled them to keep going with the entrepreneurial development. The participants indicated that they had made use of some of the money to purchase more stock to make items. Participants had been given contact numbers in other areas where they could order stock, which would be sent to them when needed. However, the participants indicated that they felt there was a shortage of adequate stock in Montagu itself, especially beads and good quality fabric paint.

During all the cycles, the researcher gathered information regarding each participant and documented the information in the form of case studies. This, together with the results of empowerment levels of the remaining participants and the data of the questionnaire completed during cycle 15 where the success of the programme was evaluated, have been integrated in the discussion of the case studies (see paragraph 4.4).

4.4   Case studies

Four case studies of individual participants are discussed. The different aspects that will be dealt with, include the general information on each participant, followed by empowerment evaluation.

The last section deals with the programme evaluation by the participants themselves. This part is concluded with a discussion on evaluation of the group's empowerment levels.

4.4.1 Case study one - General information of participant

4.4.1.1 Demographic data

Participant one is female, 18 years of age, and single. She was born in Montagu, and resides with her parents and younger sister. Her home language is Afrikaans, and she completed Grade 12 in the year 2000. At the time of the interview, she was not formally employed, but was waiting for the fruit-harvesting season, when she was going to be a part-time employee at the Langeberg Canning Company. She had never before done seasonal work at the factory, because she had only recently completed her schooling. Because she was unemployed, she had no fixed income and had to rely on her parents for support. Both her parents are employees at the MAG centre. Her father is the caretaker, while her mother is the cleaner.

4.4.1.2 Interests

Her hobbies are sewing and baking, which she enjoys doing in her spare time. She has never used any of her basic skills to generate an income. She said that she would like to attend the entrepreneurial programme, as she was thinking of starting up a small business of some sort. Her reason for this was that there are no employment opportunities in Montagu. She feels the need to learn basic business skills and training in handicrafts skills to start up a business.

4.4.1.3 Participant development

The researcher observed that this participant was very shy at the start of the programme. She never spoke up, gave her own opinion, or voiced any concern. The only way to get her to talk to the facilitator was to direct a question at her and which she had to answer, or ask her to comment on something. She interacted mostly with her sister, who attended some of the training sessions.

Although she is quiet, she showed a lot of potential during the training session. She was creative when producing items, showing good competence when it came to sewing. She was always willing to help other participants when they approached her. During the five-day business course, she did not find working with figures a major obstacle. She understood the marketing concepts, and could apply it during the practical sessions.

On market days, she did not show much confidence when interacting with potential customers. Although she knew what to do, and understood the concept of selling, she seemed to prefer staying in the background.

She was very dedicated throughout the programme, never missing a session or arriving late. Her mother also gave positive feedback regarding the items that her daughter was producing, saying that the items produced were of high standard, and that her daughter was enjoying the programme.

The researcher noticed that once she was not surrounded by her sister and peers, she worked faster, and showed higher levels of creativity. She did not form a very strong bond with any of the other three participants, and worked mostly on her own.

When the researcher went back to Montagu after the five-month break, the participant reported that she was not at that stage busy with any kind of marketing or production of items. Her main reason for this was that of time constraints, due to the fact that she was at that stage working at Langeberg Canning Company and would continue doing so for the next four months. She did, however, say that she wanted to continue making items to sell to generate an income for herself once the seasonal work was over.

During the final interview, the researcher observed that some of the items produced could not be found. It was suggested by some of the participants that other members of the group had the stock, and they were not willing to share what they had.

Participant one was not indicated by the other three participants as having extra stock or money in her possession. Because she kept to herself most of the time, the other participants did not see her as a threat. She is willing to work on her own if a production group was not formed, and felt that she is more than capable of running a successful business if she sets her mind to it.

4.4.2   Empowerment evaluation

There was a total increase of 3,69% in the total empowerment levels of participant one.

Table 15: Empowerment levels for case study one

	Micro	Interface	Macro	Total
Pre-test	68,88	63,33	67,31	63,93
Post-test	68,18	71,76	61,54	67,62

On the micro-level, which refers to personal feelings of control over one's environment (Albertyn, 1995:13), the percentage scores showed only a marginal decline, namely 0,70%. She was a very quiet participant and her attitude did not change dramatically during the programme. Her self-esteem was not very high, and she appeared to have very low levels of self-confidence. She did not show strong leadership skills, so when a situation arose that required some form of leadership,

she preferred to hand over that responsibility to another group member. Another factor that could have played a role, was that she was the youngest participant, very quiet, and she might therefore have felt dominated by the other group members, especially the eldest, who was continuously trying to criticise what she was doing.

On the interface level, which is the ability to bring about change in the conditions and relationships immediately affecting the individual (Albertyn, 1995:14), there was an increase of 8,3%. The participant acquired skills of how to interact with her peers and other individuals on a more personal level, having to give her opinion when certain facts were discussed. During the course of the programme, she was introduced to individuals with different perceptions, and people who would influence her decision-making, and she theirs. This increase in interaction is portrayed by the increase in her interface percentage score. She had to make an increased number of decisions regarding prices for items that were produced, together with deciding which premises to utilise for market days. Choices had to be made concerning type of products produced. Mutual support had to be given to her group members when selling at markets, and when making items to sell.

At macro-level, which combines consciousness-raising and participation with individuals in society (Albertyn, 1995:14), her score decreased by 5,77%. It is possible that she felt less sure about being able to influence others in such a way that they would change their perceptions. This could clearly be seen during the market days, where she did not actively participate when customers approached, possibly not wanting to interfere with their preferences. She did not show great knowledge in her awareness of her rights, which could be attributed to the fact that she is still young, and had just left school. She has never experienced a working environment before, which is where an individual's rights become so much more important.
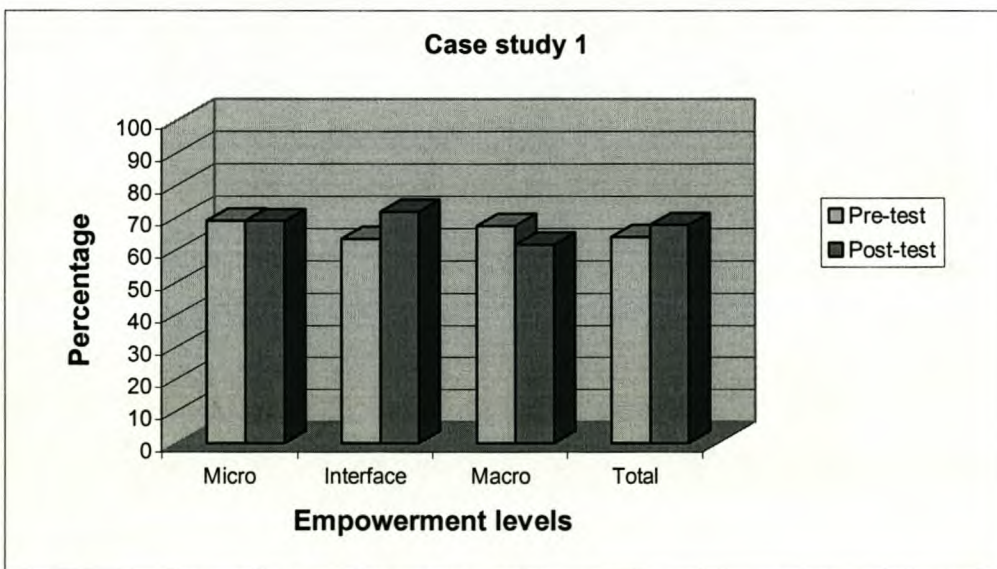
Figure 13: Empowerment levels for case study one

4.4.3   Programme evaluation by participant

4.4.3.1 Participant's perception of the programme

Case study one indicated that she had no problem with the researcher during the course of the programme. She said that the researcher was enthusiastic about what was being taught, and she also saw the researcher as a motivational force.

With regard to the **identified needs and experience of the group climate** by this participant, the following were documented.   At the start of the programme this participant had certain expectations which were met, namely that she would learn new skills which she could apply to generate an income for herself.   She found the group atmosphere comfortable, and did not experience any form of group pressure either from participants or from the researcher.   Group cohesion was felt, and she did have the opportunity to take part in the decision-making processes.

During the informal conversation which took place after the questionnaire was completed, she made it clear that she was interested in carrying on making items which she could sell.   Her interests were beadwork and sewing, which she would concentrate on.

4.4.3.2 Participant's application of skills acquired during programme

This participant indicated that she was using some of the acquired handicraft and business skills. She had made curtains ordered by a friend for which she had received money. At the time of the interview, she was not producing any items to sell, her reason being because she was involved in seasonal work at one of the factories in Ashton. Alcock (1997:145) confirms this by saying that other obligations could prevent participants from continuing with an activity. The participant also indicated that she would be prepared to start a business with another person, and she felt that she would be able to transfer her business and handicraft skills acquired to someone else.

With regard to **products made,** the participant indicated that although she had made the curtains and was paid for it, she was not actively making items at the time of the interview. If, however, she were to produce items, her marketing strategy would be word-of-mouth, because she saw it as an easy way to spread the word, and it did not cost her money. She felt that there was an interest among community members for items which she was able to make.

With regard to the **management of finances,** this participant mentioned that she was not selling items at the time.   Therefore she could not answer the questions regarding the selling of her products, buying stock and her clientele base. She had not opened a separate bank account for money she received from selling her items. However, she noted that the only method of payment that she would be willing to accept, was cash.

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4.4.4 Case study two – General information of participant

4.4.4.1 Demographic data

Participant two is female, 39 years of age, and married. She resides with her husband and two sons, aged 8 and 11. She has lived in Montagu all her life. Her home language is Afrikaans, and her level of formal schooling is Grade 8. At the time of the interview, she had no formal employment, but had worked at Langeberg Canning Company during previous seasons. For the past 7 years before that, she worked in a clothing factory as a material examiner. She receives financial support from her husband when she is unemployed.

4.4.4.2 Interests

The interests that participant two enjoys, are that of baking, sewing, reading and gardening. She has previously used her sewing skills to generate some form of income, but not on a regular basis. She does not produce new items, but only does alterations. She showed a particular interest in baking, and mentioned that she would like to use these skills for income-generation. She also found it difficult to get permanent employment in Montagu, and therefore realised her need to learn new skills, concentrating on handicraft, and how to apply these in a business environment.

4.4.4.3 Participant development

She joined in the training sessions from the start. She has a vibrant and outgoing personality and seemed to be confident in her knowledge concerning everyday issues. She spoke her mind with ease. If she had a problem, or did not understand any of the demonstrations, she would ask the researcher to explain it to her, and to help her solve any problems she might be experiencing.

She was very creative in what she made. She had some previous training in basic fabric painting, as she used to assist a lady who did fabric painting for a living. Even though she came to learn more skills, she was prepared to share her knowledge regarding fabric painting with the other participants and the researcher. During the five-day business course, the facilitator observed that she had some difficulty in doing basic maths when calculating percentage profit and pricing. This could be due to the fact that she had not completed her full school training, and so missed out on learning the basic skills. Even though this posed a problem, she enjoyed taking part in the marketing exercises, once again showing her creative side when it came to advertising products or services.

On market days, she was the participant who worked mostly with the potential customers. She did not seem threatened by them, and was willing to help and give advice. She seemed to enjoy what she was doing, always looking forward to the next market day so that she could produce more items that would be on sale. When someone was asked to look after the bag containing the

remaining items, she volunteered to do so, packing the items in the bag the night before, bringing it to the market, and then taking it home afterwards until the next meeting.

Towards the end of the programme, she became even more vibrant and outgoing, and she seemed to take charge of the market days. This might have been seen by the other participants as overpowering and domineering. The researcher however did not see her strong personality as a threat to the others. On the contrary, it was necessary if the business was to succeed, as a driving force is always necessary in a group, and she could be this driving force, taking on the leadership role.

When the researcher discussed the *Bake for Profit* course, she was the only one who showed an interest in attending the course. She joined and completed the course successfully. She was required to bake on a large scale in order to supply shops or to cater for parties. She received a few orders from community members to assist them with baking tasks. For a short period, she baked muffins, which was sold at the local home industries in Montagu. It was not a very successful project, due to competition from other individuals, and was therefore discontinued.

Once the researcher returned to Montagu after five months, this participant was working in the Langeberg Canning Company for the season, and said that she had no time at present to apply her skills to generate an income. She still showed a lot of interest in applying her skills, but said that she would give attention to this once the working season was over. She was also interested in making use of her baking skills to form a small baking business to cater for people's needs, possibly on large scale.

This participant indicated that she had no stock or money in her possession, although the other three participants suggested that she might be keeping some of the extra items, as well as money that had to be divided between the participants.

Although she was not presently making use of the skills she had acquired, she showed the most potential to start a successful business. The items she made were pleasing to the eye, and she seemed to enjoy what she was doing. She had a strong personality, which would be very useful and necessary in a business. She had innovative ideas about products that could be made. Her communication skills are good, and she took part in the *Bake for Profit* course, which gave her a good background regarding another aspect of business. During the last interview with the researcher, she said that she felt confident that she would be able to use her baking and handicraft skills to generate an income for herself.

4.4.5   Empowerment evaluation

The total increase in the level of empowerment for participant two was 11,88%.

Table 16: Empowerment levels for case study two

	Micro	Interface	Macro	Total
Pre-test	65,91	80,00	90,38	74,59
Post-test	84,85	88,33	88,46	86,47

The percentage increase at micro-level, which refers to personal feelings of control over one's environment (Albertyn, 1995:13), was 18,94%. This was the highest increase. Although she entered with a strong personality, her confidence in herself increased during the programme. During market days, it became clear that she took over the leadership role, guiding the other members of the group to follow the pattern that she thought appropriate. Her self-esteem increased once she realised that she had potential to start up and run a successful business.

On interface level, which is the ability to bring about change in the conditions and relationships immediately affecting the individual (Albertyn, 1995:14), her score increased by 8,33%. She interacted with the group members on a regular basis, and had to take part in many problem-solving activities. Once more, she was the most probable candidate to make decisions to guide the group in a suitable direction. To make a success of the market days, fellow group members had to be supported, which she managed with little difficulty. She therefore influenced her immediate surroundings in a positive manner, especially when it came to the market days.

On macro-level, which combines consciousness-raising and participation with individuals in society (Albertyn, 1995:14), her score decreased by 1,92%. This is not a big decrease, but it is possible that she felt despondent when she did not manage to bring about the type of change that she wanted to among the group members. Her awareness of rights might have been affected by the programme, as she afterwards realised that she was not up to date regarding her rights, and that she was unsure about them.

Following below is a graphic representation of the empowerment levels for case study two.
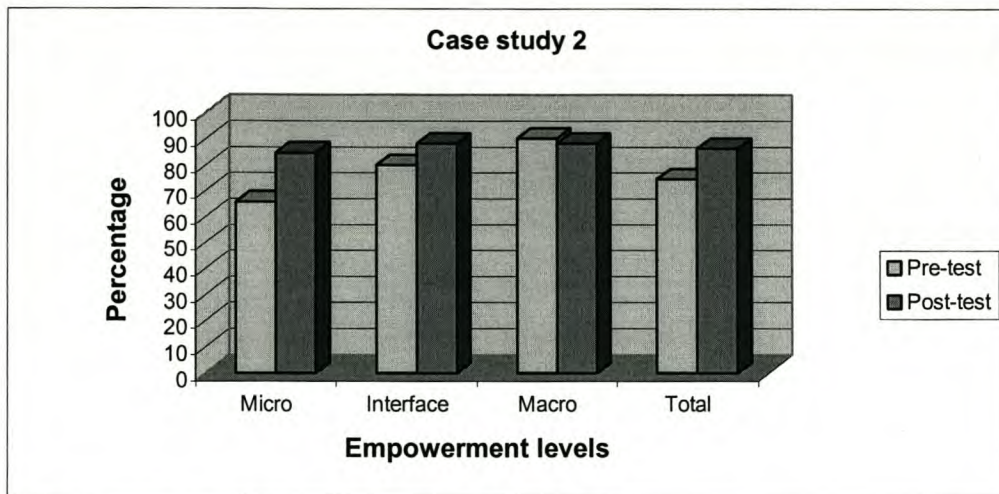
Figure 14: Empowerment levels for case study two

4.4.6   Programme evaluation by participant

4.4.6.1 Participant's perception of the programme

Case study two indicated satisfaction with the researcher and the presentation of the programme. She stated that she found the whole programme very informative and helpful. She also noted that the researcher was well organised and helpful.

With regard to the **identified needs and experience of the group climate** by this participant, the following were documented. At the start of the programme, she expected to learn how to make items which could be sold. She felt that this expectation was met. She found the group atmosphere to be comfortable, but stated that it had its ups and downs. She did feel some pressure from other group members, but dealt with it by ignoring the group members who were applying pressure. She felt this group pressure could have been the result of jealousy. She did not experience any pressure from the researcher. Group cohesion was felt, and she had the opportunity to take part in decision-making processes.

At the time of the interview, she stated that she wanted to buy fabric paint so that she could continue with her fabric painting, applying the skills she had acquired during the programme. She did not think that she wanted to continue with the beadwork, as she was having difficulty finding the appropriate beads to make items from. Literature confirms that this is one of the common characteristics of a rural area. Because rural areas are isolated, people have to travel long distances to buy suitable products (Flora *et al.*, 1992:8). At the time of the interview, participant two was not actively making any items, as she was doing seasonal work until May 2002. After that, she wanted to continue making items.

4.4.6.2 Participant's application of skills acquired during programme

Although case study two had applied her knowledge and skills previously to produce items, she was not producing any items which she could sell at the time of the interview. The items she had produced were products that were easy and quick to make, like suncatchers, pillowcases, covers for Bibles and fabric drawings. Literature states that adults prefer to acquire new skills that they can apply quickly or almost immediately to satisfy needs (Walkin, 1990:16). Participant two also produced articles as gifts for friends and family. She felt confident that she would be able to start up her own business and that she would be able to teach other people the skills that she had acquired during the programme.

With regard to **products made,** the participant indicated that she had made use of her handicraft skills to produce items to sell. The marketing strategy that she employed was word-of-mouth, because it did not cost money, and it was a quick way to spread the message. She felt that there was ample interest in the products that she had made. She chose to sell her items from home, and had also made use once of the Montagu monthly market. Most of her clients are friends. She bought her stock once a month in Montagu. Problems that she mentioned concerning stock was that beads were not readily available in Montagu, and that she had no form of transport to get her to other areas to buy stock.

With regard to the **management of finances,** this participant mentioned that she had applied the skills she acquired during the five-day business course when pricing items. Prices were calculated according to the material used, the time it took to produce, with a 10% profit margin added on. Her clients pay in cash for the items. She did not open a separate savings account to handle the extra income, as she uses this income to buy new stock for items.

4.4.7   **Case study 3** – General information of participant

4.4.7.1 Demographic data

Participant three is female, 44 years of age, and single. She presently lives with her parents in Montagu, and has a daughter of 20 who lives and works in Cape Town. Her home language is Afrikaans, and she completed Grade 8. At the time of the interview, she was unemployed, and relied on her parents for financial support. She also received money from her daughter at irregular intervals. She does seasonal work in the Langeberg Canning Company, during which time she does not have to rely on her parents or her daughter to support her financially.

4.4.7.2 Interests

Her hobbies include sewing, other types of needlework, and doing crossword puzzles. She showed an interest in the skills-training programme, as she wanted to learn and practice new handicrafts, which she could use in the home, and to make gifts for others. She also showed an

interest in learning more about the business side of production in order to generate a possible income for herself. She did not emphasise the fact that she was interested in making money, but rather that she wanted to enrich her life and then, if necessary, to be able to apply these skills in order to generate an income.

4.4.7.3 Participant development

She was one of the first participants to join the programme, and she stayed right until the end, only missing one session to visit her daughter in Cape Town. At the start of the programme, she was quiet and shy. She asked questions when she did not understand something, but only to the researcher or guest-facilitator who came around to see how she was doing. Towards the middle of the programme, she became more talkative, voicing her opinions when she felt the need to. She actively participated in the five-day business course, enjoying being creative and giving ideas regarding marketing. She seemed to enjoy gaining new knowledge, and used a good filing system for notes she received, to ensure that she did not lose any valuable information.

Although she was not very talkative at the outset of the programme, this did not influence her attitude during market days. When potential customers approached the stall, she helped them where she could without coming across as being submissive. She was always eager to help out at the markets, and seemed to enjoy being there. Once she had received money for the sales, she used that money to buy more stock for herself so that she could make items to sell on a private level.

The researcher noticed an improvement in her self-confidence as the programme progressed. This participant started talking more without hesitation, asked questions, and voiced her opinion. She would also bring along new ideas for items to be produced by the group. This indicated that she wanted to be more creative in what she was making, and that she was willing to share her ideas.

When the researcher returned to Montagu after the five-month break, the participant expressed her concern about the other group members, saying that stock and money went missing. She felt that some of the other members were in possession of it. She had some stock with her, but was not willing to share it with the rest until everybody came together and sorted out who had the extra resources and money.

She wanted to continue making items to sell, as she enjoyed it, and saw the potential it had for generating an income. She did, however, also feel that she wanted to be part of a group, even if it was just one more member, as she thought this would make production easier, and she also needed some form of support. She was sure that she could apply the business skills she had

acquired to what she was doing, but that she would be eager to attend another similar type of course and programme to increase her knowledge and level of skills.

4.4.8   Empowerment evaluation

Participant three showed a substantial increase in her total level of empowerment at 12,9%. The highest increase was on micro-level.

Table 17: Empowerment levels for case study three

	Micro	Interface	Macro	Total
Pre-test	58,33	70,00	57,69	61,27
Post-test	80,30	66,67	67,31	74,18

An increase of 21,97% was indicated on micro-level, which refers to personal feelings of control over one's environment (Albertyn, 1995:13). This is an indication that her levels of self-confidence had grown remarkably. As the programme progressed, she became more outgoing and strong. At the start of the programme, she did not show strong self-esteem, but this changed towards the end of the programme, and was clearly noticeable on market days. She displayed some form of leadership, although not as strongly as participant two. At the market days, she was eager to help with setting up the table and putting out the items on display. She also showed strong coping skills when working with money that was received, and in communicating with potential customers.

On the interface level, which is the ability to bring about change in the conditions and relationships immediately affecting the individual (Albertyn, 1995:14), her score decreased by 3,33%. This might be due to the fact that she could not solve problems with ease, and that she felt inhibited by this. It might also be one of the reasons why she indicated that she would like to continue with another type of business course. She was not very assertive, and could therefore have felt overpowered by some of the other participants at times.

On macro-level, which combines consciousness-raising and participation with individuals in society (Albertyn, 1995:14), her score increased by 9,91%. During the critical reflection stage, she became more aware of her role in society, and what her rights were. Issues concerning politics and world news were more developed towards the end of the programme, especially concerning employment opportunities. She indicated that her role in the community has become more meaningful, and that she could now develop herself to play a more positive role.
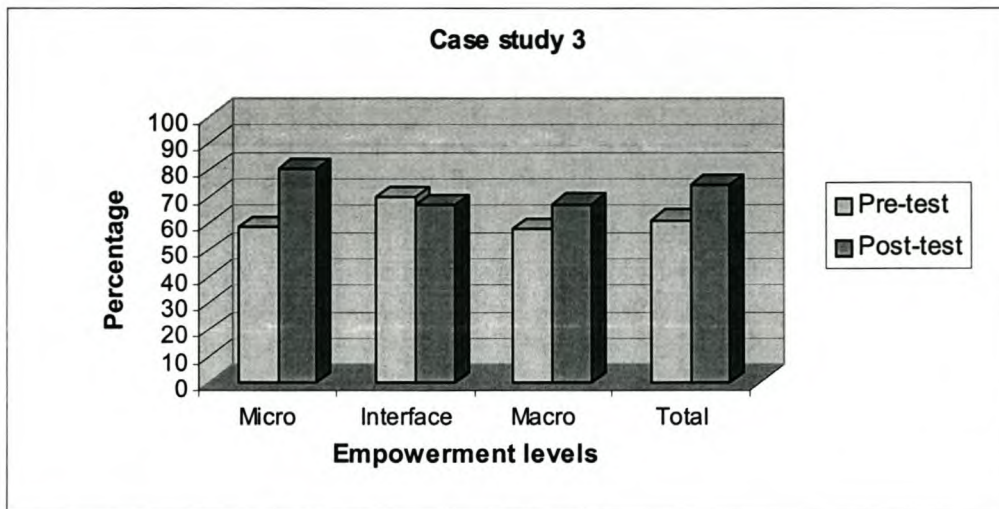
Figure 15: Empowerment levels for case study three

4.4.9   Programme evaluation by participant

4.4.9.1 Participant's perception of the programme

The third case study experienced no problems with the researcher. She noted that the researcher was very helpful and supportive during the programme. She felt that she had acquired a great deal from the programme.

With regard to the **identified needs and experience of the group climate** by this participant, the following were documented.   At the start of the programme, this participant had certain expectations, namely that the products that were made, would sell immediately. This expectation was not met, as the products made did not sell immediately, and some of it did not sell at all. Although she found the group atmosphere friendly, she noted that there were times of slight tension. She felt group pressure, and dealt with it by telling the other participants that she felt uncomfortable with what they were saying or implying. However, the participant reported that talking to them did not really improve the situation. She did not feel any pressure from the researcher. She also did indicated that there was a sense of group cohesion, and that she had the opportunity to take part in decision-making processes.

During the informal conversation after the completion of the questionnaire, participant three said that she would be willing to be part of a group if she could find the right members in the group. She felt that she would be able to work well with two of the participants who attended the business course. She had been asking around in Montagu whether there was anybody who is doing embroidery, as she would like to start learning that skill as well. She showed a keen interest in

learning any new handicraft skills that she could employ to make new items with the intention of selling these items.

4.4.9.2 Participant's application of skills acquired during the programme

At the time of the interview, participant three applied some of the handicraft skills she had acquired, namely painting continental pillow cases and doing beadwork, making bracelets and necklaces. Most of the items were intended as presents, but she had sold some of it as well. She made gifts for her mother and sister, and sold items to friends. Problems identified by case study three regarding producing and selling items were that she had no proper cash flow, and that the group she worked with did not provide a proper support base to continue making items. ISRDS (2000:2) highlights the fact that people in rural areas are marginalised and find it hard to mobilise sufficient resources to finance their own development programmes. Participant three indicated that she would be prepared to start a business with another person, and that she would be able to teach her skills to someone else who would be helping in the business.

With regard to the **products made,** the participant indicated that she sold bracelets and necklaces. She made use of different marketing strategies to market her items, namely word-of-mouth, wearing her own items, or showing it to people. She felt that there was a definite interest in what she was making. She sold most of her products through her daughter, who lives in the Wynberg area in the Western Cape. Most of her products were sold in December 2001 and January 2002, over the Christmas period, with her clientele being mostly friends and family in the Wynberg area.

She only bought stock once and relied on a friend, who was familiar with the Cape Town area, to buy stock (mostly beads) for her. Her main problem was a lack of cash. She has identified the shops in Montagu that stock beads and has priced different fabric paints as she wants to start applying her knowledge on fabric painting. She stated that, even though there was stock in Montagu, she did not want to buy it as the variety of especially the beads was limited, and she felt she could not use it to make items to sell.

With regard to the **management of finances,** this participant mentioned that she does not make use of the pricing strategy acquired during the business course. She estimates what each product had cost her to make, and then decides what price she should sell it for. The only form of payment she accepts, is cash, as she says she will not accept any other form of payment. She has not opened a separate savings account for her extra income, and uses this income to buy more materials to produce items.

4.4.10   **Case study four** – General information of participant

4.4.10.1   Demographic data

Participant four is the eldest in the group. She is 63 years old, and lives with her husband in Montagu. Her home language is Afrikaans, and she has formal schooling up to Grade 8. She and her husband are pensioners, with their pension payout as their only source of income. She was previously employed as a cleaner at a doctor's surgery. She was the only participant who had no experience of working at the Langeberg Canning Company.

4.4.10.2   Interests

Her hobbies include sewing, knitting and baking. She claimed to have used mostly her knitting skills to generate an income for herself and produced items that she could sell to friends and family. Her motivation to take part in the skills-training programme was that she wanted to learn new skills, or to enhance her skills and produce items for family and friends. She did not necessarily show an interest in generating an income for herself. She did, however, mention that she wanted to learn the finer skills of budgeting for personal use.

4.4.10.3   Participant development

She was one of the first participants to join the programme. At the start of the programme, she showed a lot of confidence in her work, and seemed to enjoy doing beadwork the most. She did, however, show her disappointment when it came to fabric painting, which she did not seem to enjoy. Because she was the eldest participant, it seemed that she wanted to take over and to be in charge of the resources, always helping herself first without considering the other participants. Although the facilitator tried to guide her away from coming across as self-centred, she did not change her habits or attitude.

During the five-day business course, she actively participated in all the exercises. She did, however, experience difficulty in working with figures, and could not always grasp the concept of budgeting. She took part in the marketing sessions, but did not always come up with very creative ideas to produce products for the market.

Towards the end of the programme, she became disinterested in what was being done or made, especially when training involved fabric painting. If a session involved fabric painting, she would not take part in it. It became clear to the researcher that the participant was becoming more and more unpopular with the other three participants. They expressed their concern about having her in their group, as they saw her as bossy and domineering, while she had no reason to be that way. She did not seem to notice the change in them, and continued behaving as before. When items were produced, she seldom had constructive criticism. She voiced her views as to how the items should be produced differently, or according to her preferences.

During the market days, she did not actively participate. She only attended the second market day, making it clear that she did not want to be part of the selling activities. Although she had excuses for not attending the other two markets, the other participants doubted whether her excuses were valid. They did not believe her excuses and thought that she was avoiding taking part in the selling process.

When the researcher returned to Montagu after five months, participant four was surprised to see the researcher. She said she was unhappy about the fact that the stock was not available, and that she wanted to make and produce more items. She did not show any interest in joining a working group, and stated that she preferred to work on her own. She claimed to be supplying knitted items for a small shop in Montagu. When the researcher approached the small shop, none of the items the participants claimed to be selling there, were on sale. The shop assistant was not aware of any of these products being sold at the shop.

Participant four presented the most problems in the working group. None of the other participants wanted to work with her, as they felt that she took charge and criticised what they were doing, without giving some form of positive feedback. She showed some selfishness when working with the resources provided to the group, and wanted to sell what she had produced to friends and not to include the rest of the group.

4.4.11 Empowerment evaluation

The total increase in the level of empowerment for participant four was 3,68%. This is the lowest score of empowerment for all four participants. It is almost the same as that of participant one.

Table 18: Empowerment levels for case study four

	Micro	Interface	Macro	Total
Pre-test	65,91	61,67	46,15	60,66
Post-test	62,12	75,00	57,69	64,34

On micro-level, which refers to personal feelings of control over one's environment (Albertyn, 1995:13), empowerment levels decreased by 3,79%. This could be due to the fact that she lost confidence in herself when she realised that the other group members were not actively listening to her or following her orders. She might have lost some level of self-esteem too. Once more, her levels of dignity could have been affected when the levels of respect she was hoping for from other group members, were not met or seen to. She also had difficulty coping with basic sewing skills and mathematical skills. This might have had a negative effect on her personal power.

On interface level, which is the ability to bring about change in the conditions and relationships immediately affecting the individual (Albertyn, 1995:14), a dramatic increase followed, namely 13,33%. Because she was part of a group, she had to develop some form of mutual respect and support for her fellow group members. She had to interact with her immediate surroundings on a regular basis due to the nature of the programme, and this could have created some form of awareness as to the needs and demands of potential customers to which she had to pay attention. Although she did not show good problem-solving skills, she made a point of thinking of possible solutions to problems, and would discuss this with the other group members and come up with some form of solution.

On the macro-level, which combines consciousness raising and participation with individuals in society (Albertyn, 1995:14), the empowerment percentage increased by 11,54%. This could be an indication of awareness she was creating as to the importance of participating in a group to help bring about change. She might have realised that once she became part of a group, bringing about desired changes would be realised easier with more people standing together. She possessed greater awareness concerning her rights, and how to use these to her advantage, especially in a business environment.
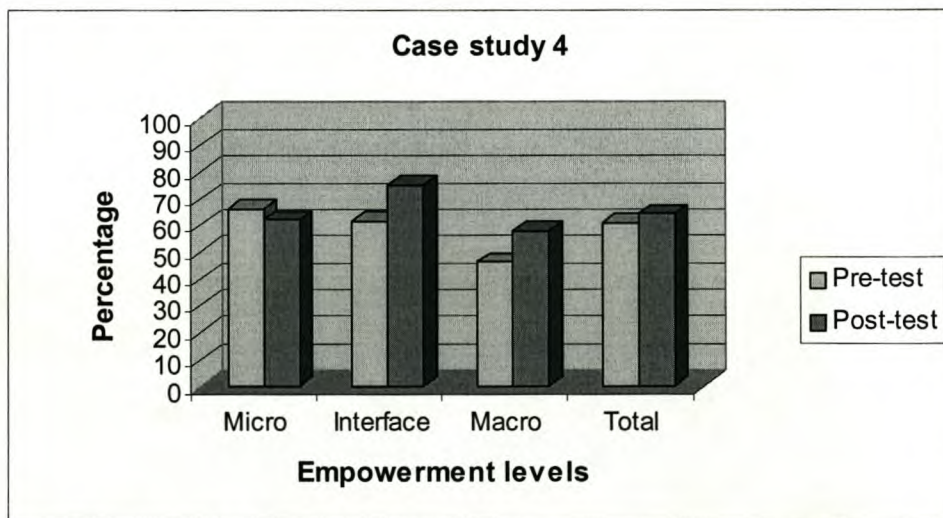
Figure 16: Empowerment levels for case study four

4.4.12   Programme evaluation by participant

4.4.12.1   Participant's perception of the programme

Case study four indicated that she had no problems with the researcher during the programme. She found the researcher to be helpful, friendly and paying attention to any needs that were identified.

With regard to the **identified needs of and experience of the group climate** by this participant, the following were documented. Her expectations of learning new handicraft skills during the

programme were met. She found the group atmosphere to be friendly, and did not feel any group pressure, either from the participants or from the researcher. She thought there was good group cohesion, and that she had the opportunity to take part in any decision-making process.

During the informal interview, she indicated that she had managed to get a young adult to help her make items like aprons, and oven gloves and to do beadwork. She indicated that she was teaching the young adult how to make these items, even though the young adult already had some previous sewing experience.

4.4.12.2   Participant's application of skills acquired during programme

She applied the skills she had acquired during the programme. She produced placemats and oven gloves, was doing beadwork, and mostly applied her sewing skills. Most of the items she made were going to be Christmas presents. She also produced a few items to sell, mostly to friends. She did not provide any reasons as to why she would not be able to apply the skills she had acquired to generate an income for herself. She indicated that she would be able to start a business with another person, and that she would be able to teach others the skills she had acquired.

With regard to **products made,** the participant indicated that she was selling her oven gloves. She also indicated that she had sold two tablecloths to friends, and was knitting bed socks that she had on display at a craft shop in Montagu. Her marketing strategies consisted of word-of-mouth, and showing her products to friends and family. She felt that there was a definite interest in the items she had made. Apart from the craft shop, most of her items were sold from home. She indicated that she was selling almost 12 items per month from home, and between two and four from the shop. According to her, the clients who bought from her home, were mostly friends and family.

She buys her stock from a small retailer in Montagu. Stock is bought approximately twice per month. Some of the problems she indicated when it came to buying stock, were that there was no retailer to buy a variety of beads from, and that she had no transport to go to other towns to look for stock.

With regard to the **management of finances,** this participant reported that she priced her products by estimating a suitable price, therefore not making use of the pricing strategy acquired during the business course. She accepts only cash, and she had not opened a separate bank account for the extra income. This income was used to buy more stock in order to produce more items.

4.4.13 Discussion regarding the group's empowerment levels

The average increase in the group's empowerment levels (in terms of all four individuals included in the case studies) was 8,1%.

Table 19: Empowerment levels of the case studies combined

	Micro	Interface	Macro	Total
Pre-test	63,3	68,8	65,4	65,1
Post-test	73,9	75,4	68,8	73,2

On the micro-level, which refers to the personal feelings of control of one's environment (Albertyn, 1995:13), the average empowerment levels increased by 10,6%. This indicates that participants had become more confident in themselves and what they could achieve. Their levels of self-confidence had become stronger, possibly because they were working as a group, and had to talk to the other members about what they thought, or wanted to do. The market days also assisted in this, as they have had to deal with potential customers at these events.

The interface level, which is the ability to bring about change in the conditions and relationships immediately affecting the individual (Albertyn, 1995:14), saw an average increase of 6,3%. Because participants had to function as a group, they provided one another with the necessary support, and showed each other respect at most times. They were working towards becoming a social group, forming a bond between one another. This became visible especially during the market days, where they had to relate to one another and their immediate surroundings.

On macro-level, which combines consciousness-raising and participation with individuals in society (Albertyn, 1995:14), the average increase in empowerment level was 3,4%. All in all, not much empowerment of the individuals took place on this level. The participants however seemed to become aware of their influence on the dynamics of the group, and their role as a group member. Most of them realised that if they functioned as a unit, change would take place easier than if they did not support one another. This was clearly demonstrated during production time at a sewing session when a work group was formed. The group could produce items faster than the individual could have done, and the items they made, were of higher quality.
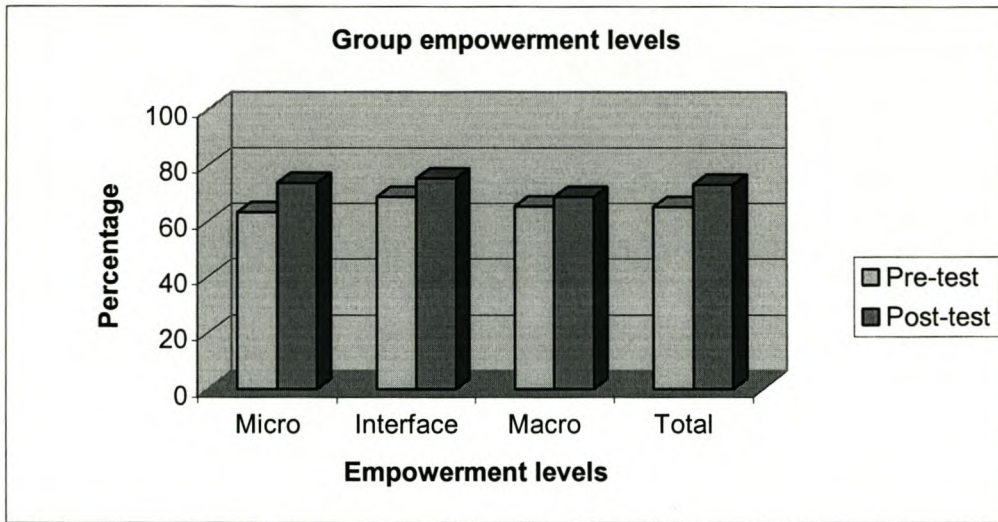
Figure 17: Empowerment levels of the case studies combined

4.4.14 Summary of the case studies

The four case studies as discussed provide an overview of each participant, their progress throughout the programme, their empowerment evaluation and their perception of the programme. Even though there was a notable age difference between the participants, they all exhibited some form of progress during the programme. Each showed an increase in her empowerment levels, and all indicated that they had found the programme to be beneficial for their personal use. Although they all indicated that they were not actively involved in using their acquired skills to generate an income, they said that they could apply these skills.

CHAPTER 5

DISCUSSION OF RESULTS

A discussion of the context analysis (objective 1.3.1) is followed by an explanation of the outcomes of the interest survey (objective 1.3.2)

The third objective (1.3.3) stated that skills-training projects would be presented and evaluated in a non-formal adult education programme. This evaluation took place according to the PAR research method and on a continuous basis. Each cycle consisted of four main steps, namely to plan, act, observe and reflect. The research monitored progress during each of these 15 cycles. The participants did a rediagnosis of needs during each cycle. From the outcomes of this monitoring and the rediagnosis of needs during each cycle, it was possible to devise a *Revised plan* to start the next cycle. The results gathered in this way are discussed in paragraph 5.3.

The case studies (objective 1.3.5) integrated data of the participants' general information, their empowerment evaluations (objective 1.3.4.1) their perception of the success of the programme, and the researcher's perception of the programme success (objective 1.3.4.2). These results will be discussed in paragraph 5.4. Thus the evaluation research entails formative evaluation through the monitoring of the programme as well as a summative evaluation. This included the evaluation of the programme by the participants and the researcher.

5.1 Context analysis of a demarcated rural area

Tourism should offer employment opportunities in Montagu. Although *Route 62* is ideally situated for tourism, which should make jobs available, and although 140 000 tourists per annum pass this town, a relatively high percentage of inhabitants are unemployed. This corresponds with the fact that rural areas generally display high levels of poverty, mainly due to the lack of employment, and their isolation from bigger towns and cities. Tourism should be used to offer employment opportunities to the people of Montagu, making it possible for them to generate an income. It is possible that the poor do not have the resources, like knowledge or time (possibly due to caring for children or the elderly), to make use of these opportunities, and therefore they stay in the cycle of poverty.

Montagu is surrounded by farms. Rural areas are known to focus their economic activities on agriculture. As referred to in the literature and the context analysis, employment in rural areas generally consists of seasonal work, where people work on farms during harvesting time, or in the factories, processing items like fruit or vegetables. One of the reasons for the relatively high unemployment is seasonal work, which often leads to poverty. Seasonal workers tend to have an

erratic income, making it easier for them to fall into the poverty trap. They generally also have a lower level of education.

On the basis of this assumption the inhabitants of Montagu will benefit from training in entrepreneurial skills and an opportunity to generate an income for themselves. Referring back to the literature, change should be encouraged in rural areas for people to be able to increase their income by investing in themselves and their communities (ISRDS, 2000:19).

In order to alleviate poverty, it is necessary to educate people (RDF, 1997). During the study, the focus was on the previously disadvantaged. As highlighted in the literature, the apartheid regime in South Africa prevented many people from receiving adequate education, leaving them uneducated and with no real skills to apply (RDS, 1995).

There seems to be a link between the low levels of education amongst the rural poor and their state of poverty. Training and retraining to help build marketable skills and human capital are critical to help integrate the poor into the employment market (Poverty and inequality in South Africa, 1998). To substantiate this argument, table 20 compares the amount of education with the percentage employment in rural South Africa (South Africa, 1998). It shows that a low level of education normally leads to unemployment, compared to higher level of education, almost being a guarantee that employment will be found.

Table 20: Relationship between percentage employment and level of education

Level of education	Employment in rural areas
No education	69%
Primary education	54%
Secondary education	24%
Tertiary education	3%

(Poverty and inequality in South Africa, 1998).

Several goals were highlighted in the literature regarding rural development. One of these goals focused on helping rural people set priorities for community development, thereby helping to bring about change in their own environment. Another goal was to increase non-farm production, which could once again be linked to the tourism industry. Attention should therefore be given to enhancing development, possibly with the help of tourism (IFAD, 2002:104). Tourism could benefit a community and could help to relieve unemployment. However, to be on a par with world-wide standards regarding the quality of services and products, training is essential. As indicated in this study, unemployed adults are not highly qualified. Therefore, adult education seems to be a viable method for skills-training.

After contact was established with the local training centre in Montagu (MAG) it was clear that there was a potential for the implementation of a non-formal adult education programme. However, there also seemed to be a lack of involvement of community members in the activities of this existing centre.

Results on MAG as a resource and training centre revealed that this training centre has in the past presented previous business courses to teach entrepreneurial skills to people. The success rate of these courses seems minimal, with only one participant actually applying some of the information at present in a small shop in Montagu. This indicates that even though a training centre is available, it does not mean that training will necessarily result in sustainable enterprises.

All the courses previously presented at MAG were five-day courses and were not integrated with a holistic programme. The researcher therefore suspects that fragmented programmes are not successful in the long run. There was also no follow-up of any of the participants, which points to the non-sustainable nature of the business training programmes.

Another factor that could have had an impact on the business courses is the possibility that the quantity of participants is more important for the programmes than the quality, pointing to a profit-making factor, which generally excludes the needs of the people. Companies and organisations are often more interested in the amount of money they can make during any one programme, and do not pay sufficient attention to the participants themselves.

As mentioned in the Rural poverty report (2001:21), problems faced by the poor are multitargeted (as in paragraph 2.1.6), and therefore it does not help if just one problem is dealt with. People need to be taught different skills in order to help them to escape the poverty trap.

5.2   Interest survey

The results of the survey to determine the interests of a segment of the community regarding skills-training projects indicated that more females than males are at home during the day. The males were either not at home, or they did not want to take part in the questionnaire. Those who were not at home, correlated with what literature says regarding gender and rural areas. The men are most likely to be out during the day, being the breadwinners. The woman stays at home to carry out the domestic chores or looking after children and the elderly. They therefore have little time to take part in the economic market, and to generate an income for themselves. Women in rural areas are at a particular risk of being poor (RDS, 1995). It is reported in the literature that women should be targeted for training in economic development, to help them out of the poverty trap (Poverty and inequality in South Africa, 1998). This could be one of the reasons why business

skills came across so strongly in the survey, as the respondents felt that they needed to create employment that would lead to an income.

Another factor that could be considered is that the majority of the respondents (16 out of 25) were between the ages of 18 and 45. In South Africa, this constitutes the workforce. If these people are currently unemployed, it emphasises the fact that there are not enough jobs in the area to support the workforce. This enforces the idea that education and training are very important if people in rural areas want to start generating an income for themselves to increase their standard of living.

Although all participants received some form of formal schooling there seems to be a great demand for more training in the Montagu area. The main reason given for this was the high levels of unemployment being experienced. Sixteen (16) of the 25 respondents thought that business training and aspects that link with this are necessary, as this could help them to generate an income for themselves. Even though interest was shown in other areas of skills-training, the goal of the study was to concentrate on entrepreneurial training, incorporating handicraft skills into the programme.

The previous business-training courses offered at MAG had no supporting structure to it. Participants were taught basic business skills without them having the opportunity to apply it firsthand. No follow-ups were done by MAG to determine whether the skills taught during the previous courses were being applied by those who had attended these courses.

Many of the respondents indicated that they would be able to spend at least one day per week in skills-training. This indicates that they do have quite a bit of spare time on their hands which could be used for skills-training in order to develop their entrepreneurial skills. This was seen as an opportunity by the researcher and the respondents, as time constraints were not going to be a major limiting factor when developing the programme.

The third objective of the present study was to develop and evaluate skills-training projects through a non-formal adult education programme. This was conducted through a PAR approach that allowed the programme to adapt to and to change according to the needs of the participants.

5.3   Developing and evaluating training projects

As stated in the literature, action research is a systematic research method that includes data gathering and constant feedback. This takes place during the action research cycle of planning, action, observation and reflection (Darling,1998). There should be a continuous flow from one skills-training project to the next, with the participants actively engaged in activities that are related to the main objective of developing their entrepreneurial skills. All the procedures that are

followed, should have the ability to be implemented by taking the facilities and time available into consideration. Every project should be logical, and the amount of learning which is going to take place should be appropriate in terms of the allocated time. Participants should be informed of their progress in any project at all times (Robinson, 1995:101-102). In the research under discussion this activity took place during the reflection stage of the PAR cycle, where participants were involved in assessing their progress and evaluating what they had done. Participant evaluation was done by means of PAR, where participants had the opportunity to monitor their progress during each cycle.

5.3.1 Planning

Altogether 15 PAR cycles took place during the 14-month research period. These cycles ranged from needs assessment, experiential learning, and evaluation of the programme. Each cycle started with a set plan which participants followed during the cycle. Each plan originated from suggestions made by the participants. The literature states that the planning process should be constructive, and that this planning flows from the discussion with the stakeholders, in this case, the participants (Seymour-Rolls & Hughes, 1995).

As the participants in this study had control over the planning process, they decided on which activities they wanted to partake in. They identified their training interests, starting off with fabric painting, moving onto beadwork, and combining these skills with sewing. Most of the suggestions as to what skills-training projects they needed, came from the older participants in the group. In general those participants still in school found it difficult to take part in the planning process. During the planning sessions, open discussions were held amongst the participants regarding what they would do during that particular session. These open discussions gave all the opportunity to voice their opinions as to what they wanted to do. If there was conflict between them regarding the activities, the researcher tried to resolve it without upsetting any of the parties. Hughes (2001) says that participants taking part in the decision-making process might not always have the same input or interests. Most individuals have different wants and needs and a different amount of resources to contribute to the plan.

It should therefore be kept in mind that possible back-up plans need to be in place during the planning stage. This is to ensure that there is a viable alternative to resolve the problems in the event of conflict or boredom to ensure that all parties are fairly satisfied in the end. During the research, boredom occurred in cycle eight, and this was dealt with by allowing the participants to choose the activities in which they would like to partake. This gave each participant the opportunity to practice the skill which interested her most.

5.3.2   Action

Seymour-Rolls and Hughes (1995) state that the plan is put into motion during the action stage with the hope of improving a social situation. In this study, the aim was to improve the lives of the participants by helping them develop their entrepreneurial skills. The aim here was for these people to be able to generate an income for themselves. All the plans the participants agreed on were put into action. They took part in several training activities that were associated with different handicraft skills. This was coupled to a business course where they had the opportunity to apply their business skills to generate an income, by going through the whole process of buying stock, producing items, pricing these items and eventually marketing and selling their goods.

The activities in which participants took part, were mostly the kind that provided them with instant satisfaction. Items that were produced could be completed during a single session. All activities were practical and hands-on, involving the participants during the whole process. In the literature, it is mentioned that adults see learning as an active process, and they will therefore learn at a faster rate if they can participate actively. Added to this is the matter of applicability, where newly acquired techniques should be applied immediately to ensure that retention is longer (Robinson, 1995:5). During the programme, beadwork was introduced, as this activity ensured that the participants could produce items quite rapidly, ensuring immediate satisfaction. Participants also showed a keen interest in the beadwork, and seemed to enjoy this activity.

During this action, there seemed to be good interaction between most of the participants. Some tension between the participants did occur towards the end of all cycles. This was because some participants expressed interest in generating an income from what they had acquired, and others did not have the same drive to generate the income. As noted in cycle 11, one of the participants did not attend because she was not enjoying the activity that took place.

Participation needed to take place between participants to ensure the success of the programme as was the case between participants and the researcher. If there was no participation, each participant would have worked on her own, and the possibility of selling items at the markets would have been minimal. The teamwork that existed during the training projects encouraged participants to work together as a group. This helped each participant to achieve her own goals of making items which she did sell to generate an income. As Dick (2000) mentions, in order to reach a successful outcome from an action, those who are most affected by it should back it by contributing in a participative manner. The eldest participant in the study did not actively participate in the group activities, and did not always participate in the selling of items. She was possibly not interested in generating an income. Her participation, or lack of, was reflected by her not generating as much income as the other participants who actively took part.

5.3.3   Observation

In observation, changes are noted for their effect and the context of the situation (Seymour-Rolls & Hughes, 1995). During each cycle, the researcher noted the number of participants that took part in each session. When analysing the cycles, it was clear that a large number of participants dropped out during the programme. At the start of cycle three, when the first skills-training took place, 11 participants took part. During cycle six, the number of participants increased to 13. The numbers then dropped to seven participants. Towards the end of the programme only four participants remained. These fluctuations are not uncommon, especially when a programme is presented and participants join in on a voluntary basis.

When taking part on a voluntary basis, participants may decide to attend some sessions, and to stay away from others. Factors that keep participants from attending, are identified as obstacles. The literature supports this, with Grotelueschen *et al.* (1976:99) naming different obstacles, like lack of time and money, or transport. Other obstacles may be of a more personal nature. Robinson (1995:73) mentions that some participants could learn at a slower pace, and they might therefore feel threatened by new information being acquired. In this study this became clear with the eldest participant not learning the new skills as quickly and as easily as the others, which might have been the reason for her not attending all the sessions.

There is no specific time when adults stop learning. Learning can continue throughout the full lifespan of an adult. An increase in age does not diminish someone's capacity to learn; only the speed or rate of learning is affected which generally occurs because of a lack of active learning. The differences in the ability of adults to learn generally depends on educational background, occupational level and social status and not necessarily age (Robinson, 1995:29; Daines, Daines & Graham, 1994:3). This is particularly relevant to the eldest participant who showed the most resistance to taking part and staying a member of the group. She showed resistance to learning new skills, which might indicate that she thought she could not learn any other skills, and possibly did not want to.

In cycle seven, there was a significant drop in participants, from 13 to nine. This might be due to the fact there was a month's break between two cycles. Some of the participants might have forgotten the next meeting time. In the case of a long break, clear instructions should therefore be given regarding when the next meeting will take place, or where the information of a date for the next meeting could be found. This might limit the opportunity of any participants dropping out, or missing a session because the date of commencement was not made clear.

5.3.4   Reflection

During the reflection stage, all stakeholders are involved in examining, constructing and re-evaluating their concerns and problems. A programme might not reach its end, but this is not always a negative factor. The original problem might have been sorted out, but a new unidentified problem could have occurred. Participants might not yet have found a solution to their first problem, before the second one emerged, which would then only be dealt with in a new programme (Seymour-Rolls & Hughes, 1995). A project's results cannot always be visible during its duration or at completion, as effects can appear at a much later stage, in an unknown context where it will not be possible to determine the extent of change or actions and the link these have with past project interventions (Garaycochea, 1990:68). Any programme should therefore be given time to settle into the lives of the participants before its outcome is assessed in full. It might take a month or a year for the outcomes of a programme to be visible.

Any learning which occurs should be reinforced by means of feedback to the learners (Robinson, 1995:6). Participants should be encouraged to reflect on what they had acquired and possibly achieved. They should be allowed to assess their own progress and to judge for themselves how well they are doing, and then be given the opportunity to decide whether they needed additional practice, and to judge themselves on how well they are doing (Robinson, 1995:82). Feedback was provided to the participants during the market days where items were sold. This gave them an idea as to which items were popular with the clients. Feedback was also given to participants in the form of constructive advice on the items they were making, and on how they could improve their skills by making other or more advanced items. This is in accordance with the literature by Daines *et al.* (1994:8), which mentions that feedback given to participants must be constructive.

Once the non-formal adult education programme was completed, it became clear that all producing and selling activities had come to an end. None of the four remaining participants had continued working as a group, making items and selling them. In the light of this, it could be said that it might be necessary to give participants a bigger support base from which to work, without making them too dependent on a facilitator. Someone from the community could therefore be drawn to a programme like this to ensure that there is one facilitator in the area to provide support and give suggestions and encouragement.

5.3.5   General discussion

During this study, it became clear that women were the predominant gender taking part in the programme. The specific training skills identified during the first meeting, namely sewing and fabric painting, might have seemed to be more of a "women's skills", which might have caused the men attending that meeting to decide not to join the programme. Society still associates women

more readily than men with handicraft skills like fabric painting, beadwork, and sewing, whereas men are more interested in skills with a more masculine approach, like woodwork. Even though both genders showed an interest in the business side of training, men might have lost interest in the programme, when handicraft skills were introduced as the first activity.

The number of women turning up at the first meeting also far outweighed the men, which could have caused some degree of gender domination. The men might have felt that they were the minority, therefore preferring not to become part of the programme.

5.3.5.1 Drop-outs in the programme

A high number of participants dropped out during the programme. One participant did not complete the programme as a result of finding employment. The younger participants dropped out possibly because the programme was interfering with their schoolwork, which should be the top priority of a scholar. Several reasons are given by a variety of literature sources as to why participants drop out of a programme. Houben (1992:139) states that someone's self-image might either be altered or threatened by new developments taking place, resulting in something that they do not want. They might find the programme unsatisfactory, possibly because their needs are not being met. Daines *et al.* (1994:5-9) state several reasons as to why participants might leave a programme. Adults bring their own values and attitudes to programmes, but over-acquired habits and strong beliefs could be a drawback, preventing participants from participating in a new experience. Furthermore, adults do not want to make mistakes or look foolish, which is especially relevant in the case of those who have a poor schooling background. This sense of anxiety could cause a participant to withdraw. Some adults might still expect to be taught, instead of realising that they are being given the opportunity to participate actively in the planning of a programme through rediagnosis of needs. They might therefore not want to take responsibility during this planning action. Some adults might not enjoy taking part in group activities as they tend to be highly task-orientated. They might experience group work as lacking direct purpose and might therefore not continue with a programme that places emphasis on group participation. Lastly, participants might lose motivation during the course of the programme. The rewards might not be what they expected or the programme might prove to be too difficult. Some of the reasons for participants leaving a programme might be their failure to achieve their own goals, a lack of overall purpose, the setting of unrealistic goals, an unfriendly atmosphere or poor group support.

Many adults have barriers to learning, which might cause them to drop out of a programme. Some of these barriers can include bad experiences in educational settings, age, physical impairments, or a feeling that they cannot learn anymore because of age, or not being actively involved in the learning process for a long period of time (Walkin, 1992:17).

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5.4   Case studies and concluding remarks

All the participants in the case studies were female and aged between 18 and 63. Men did not seem to show much interest in the programme, as indicated earlier. All four participants were born in Montagu, and had lived there most their lives. Three of the case studies had an erratic income, with only one being able to rely on pension money. Three had been doing seasonal work in one of the canning factories in a neighbouring town. This is going to put strain on the amount of time they have in which to practice and apply the skills they have acquired during the programme. During harvesting season, many of the people in Montagu do seasonal work for several months on end, limiting their time to take part in other activities.

The general interests indicated by the participants were handicraft skills, like sewing and baking skills. All showed an interest in learning skills related to business, either entrepreneurial skills or the finer art of budgeting for personal use.

All participants showed some growth in their levels of empowerment, with the biggest improvement being 12,9% and the two with the least improvement being 3,68% and 3,69%. The group as a whole showed an increase in their empowerment level of 8,1%.

The respondent of case study three indicated that she had expected to sell her items immediately. This might indicate that proper market research was not conducted by the participants to determine the needs of possible clients, or unrealistic expectations might have been set at the start of the programme, as with case study three.

The respondent of case study four indicated that she used to be employed as a secretary. Upon further investigation into this matter, it became clear that this was not true. During the business course, it became clear to the facilitator that she would not have been able to have a secretarial job, as she had difficulty writing, and could not read fast. These are two skills which are vitally important when acting as a secretary.

The younger participants exhibited a level of shyness, which was not apparent in the older participants, especially in the beginning of the programme. This could possibly have been because they have not yet had a lot of opportunity to interact in an adult group setting. They might have lacked sufficient confidence to speak up and voice their opinions. Walkin (1990:17) states that young people might still rely on the facilitator for guidance and control, preventing them from being self-directing.

Results of the final questionnaire on the participants' perception of the programme indicated that they were very positive about the programme. From their feedback it became clear that they had

learnt a lot during the 15 cycles, and that they were confident that they would be able to apply their knowledge if given the opportunity. Unfortunately, none of the participants were busy making or selling items at the time of the final evaluation of the programme. One of the main reasons given for this was that they did not have the capital to start a business or to keep one running.

The participants perceived the programme as being generally successful. Evaluation of the application of the acquired skills revealed that skills were not applied. No income was therefore generated. The goal of the non-formal adult education programme was to implement skills-training projects to assist people in generating an income.

If income-generation is used as the only criterion to measure the success of the programme, this programme was, to a limited extent, successful whilst the researcher was involved. Unfortunately there was no sustainability in this regard. It might, however, be possible that the positive effect of the programme will only come through at a later stage. A project's results are not always visible during its duration or at completion as effects could still appear at a much later stage, in an unknown context where it might not be possible to determine the extent of change or actions and its link to past project interventions. Any social development project could deliver unexpected results which were not part of the initial goals, but which are still a success (Garaycochea, 1990:68).

The success of the programme was not easy to determine, and it is suggested that follow-up investigation should be done to determine whether any changes have occurred over time. All the participants indicated that they use the skills which they have acquired, and apply it when they produce items. None of them were at the time of the evaluation of the programme actively producing and selling items. In the case of two participants, the reason for this was the seasonal work. Other reasons mentioned, were problems with cash flow. The participants should therefore be given a longer period in which they can practice and apply their entrepreneurial skills before any assessment can be made regarding the success of the programme.

The programme had positive outcomes. Although there were only four participants that completed the programme, these four showed an increase in empowerment levels, and observation revealed an increase in creativity as well.

The skills acquired by participants could be applied at any stages in their life. They might therefore apply these skills only in a few years' time in order to generate an income. If one wants to determine the success of the programme at a later stage, another follow-up evaluation of the four participants will have to take place to determine whether they have started applying the skills.

CHAPTER 6

CONCLUSIONS AND RECOMMENDATIONS

In any research, a proper context analysis should always be conducted in order to plan a suitable programme and to deal with any unfelt needs people might have. If response to an invitation to attend is low, another method might have to be formulated to attract people to a programme, especially if the programme has to be beneficial to them. The number of people who initially responded to the invitation to join the programme, was satisfactory. However, this number decreased towards the end, which caused some concern for the researcher, but the researcher did not terminate the programme, as the value of the programme for participants attending and the value for the researcher, did not decline.

Nowadays much emphasis is placed on the number of participants taking part versus the quality of their skills and competencies, where the higher number of participants taking part seems to be more beneficial to a programme than the quality of the programme and its participants, because of the profit factor involved when high numbers of participants take part. Emphasis should be on training a small number of people to ensure that results are favourable rather than trying to get results through high numbers taking part in a programme to make it more profitable, mainly for funders or facilitators doing training for a living.

As in this research, it can happen that one gender is dominant in a training programme. The programme planner should therefore try and integrate training aspects which will address the needs of both genders. Skills to address the needs of male participants might have to be incorporated into future programmes to ensure this. In a similar study, it might even be advisable to have two training groups running concurrently, both with the main objective of generating an income, but concentrating on different training skills in the two groups. The heterogeneity of a group does not have to influence the participation amongst the participants negatively. It can be used in an advantageous way to help stimulate creativity among participants.

Even though a high number of drop-outs were reported during this study, a decision was made to concentrate on those participants who completed the programme. In a future study similar to this, the researcher could concentrate on those participants who drop out of a programme, providing insight into the problems or obstacles faced by them.

If participants in a programme show levels of shyness, the problem should be dealt with as soon as possible to prevent participants from dropping out of a programme as a result of feeling pressurised to interact constantly. Dividing the training groups into smaller units with young and old participants in separate groups might encourage the shy participants to interact more easily.

Increased group interaction might have to be implemented, together with a role-playing session. This might help to encourage shy participants to become more confident in their interaction with the other group members.

In this research, the support base that participants relied on was the researcher. When the researcher left the programme after a period of eight months, all programme activities ceased. This indicated that, at the time, the programme was not sustainable. It might therefore be necessary to provide programme participants with a support base when the researcher and/or facilitator leaves the programme. Someone from the local community should to be trained to act as a facilitator in a programme to guide participants and to give support. Participants might need someone they can lean on, to help them stay motivated and to continue with the programme. Without the motivation and support of a leader figure, participants might lose interest in the programme.

Most people generally have some skill or skills that they can use to generate an income, but this does not mean that they will actually use those skills in an entrepreneurial fashion. Many people will not necessarily benefit from entrepreneurial programmes either. It might therefore be advisable to develop an instrument to determine and identify the potential of participants regarding entrepreneurship. In this research, this type of instrument would have been ideal as potential entrepreneurs would have been identified before the programme started, ensuring that the drop-out rate was kept to a minimum. Research on developing this instrument is therefore needed to ensure that programmes promoting the development of potential entrepreneurs are successful.

At the introduction of this programme, participants were asked to partake in the initial discussions regarding the skills they wanted to develop during the programme. The facilitator suggested some skills and provided guidance regarding the skills-development. This might not have been the best way to determine what participants would like to learn. It is therefore suggested that participants are given no form of guidance when deciding on the types of programmes they would like to take part in. They should be given the sole responsibility of making the choice to take ownership of the programme.

All participants taking part in a programme should be provided with some kind of incentive to ensure that they remain faithful to the programme. These incentives normally come from the facilitator running the programme, but some of the incentives should come from the participants as well. Incentives that the facilitator could give to the participants, are usually in the form of learning new skills and using various resources to practice these skills. Participants should prove their commitment to the programme in some way. This could be by paying a registration fee. However, caution should be taken against asking for a monetary contribution up to the point where participants start selling and generating an income, as this might prevent participants from taking

part in a programme similar to this, because they might not have the necessary monetary funds to make some form of contribution. Other forms of contribution should be identified, possibly with the help of the participants themselves.

One method of generating an income is by selling goods at markets. A problem identified in this research was that the participants did not have enough access to markets where they could display and sell their items. For this reason, it is advisable that other ways are identified in which skills could be applied to generate an income.

These days a fair amount of emphasis is placed on training in South Africa and the qualifications associated with it. It is therefore suggested that all training programmes should be accredited before the presentation thereof. The South African Qualifications Authority (SAQA) could possibly become involved in a programme of this kind to ensure that the training received is recognised by society as valid and relevant in today's business world.

Conducting a study like this should be encouraged in the South African society in order to help people realise their potential and to find ways in which they can utilise this potential to the best of their ability. When conducting a PAR programme, the researcher must be aware of the different monitoring and evaluation instruments that can be used. Any possible obstacles should also be identified before the programme commences to ensure that the programme has a suitable backup plan, which should evolve from the reflection stage of PAR. The monitoring and evaluation of a programme should be thorough, making use of well developed measuring guides. If all these aspects are in place, a programme should show success regarding its outcome.

The context analysis conducted for the research, identified a suitable rural area in which to implement the programme. All aspects concerning the characteristics of a rural area were on par with what was found in the literature. This made the area of choice to conduct the programme ideal for the research, as entrepreneurial development was needed to help people generate an income.

The methods used to determine the interests of the community in this research were successful. It might be necessary to make use of a more in-depth method in future to determine the differences in interests between genders. The research conducted was not successful in attracting participants from both genders, even though an interest assessment was conducted. It would have been representative if more men were involved in the programme, but women were predominant, which could make the results seem biased.

The researcher concluded that the programme itself was successful. Although the number of participants taking part declined, those participants who did complete the programme indicated

that they benefited from the knowledge gained, and the researcher believes that this is the case. By making use of the measurement of the three levels of empowerment (namely micro-, interface and macro-levels) of participants, it was possible to see where participants had grown in terms of their empowerment. The growth in empowerment can also contribute to the success of the programme itself, demonstrating that this type of developmental programme can increase the empowerment of participants.

Following the PAR method is ideal for this type of developmental programme. It allows changes to be made at any stage during the programme, ensuring that monitoring contributes to reaching the outcomes which are aimed for, making the possibility of success greater. The PAR cycles allowed the researcher to adapt the programme to suit the participants, and to take into consideration the changes that had to be made as the number of participants declined. Monitoring and evaluation were an integral part of PAR. The monitoring and evaluation that took place during the research was successful as several changes were incorporated into the programme during the PAR cycles to ensure that objectives were met. The instruments used to monitor and evaluate the programme were adequate, but if a similar programme is presented in future, changes may have to be incorporated to adapt the instruments to the specific situation (i.e. different cultures, or moving from a rural to an urban area).

The use of case studies in this research proved to be ideal. Each individual case study gives the reader an in-depth understanding of each participant and how they experienced the programme. Where the number of participants drop below 10 in this type of programme, it is advised that case studies be used to document information and determine the success of a programme.

While conducting this study, it was noted that participants were dependent on seasonal work for income generation. This income provides them with a sense of security, which is a possible reason why they did not pursue the acquired entrepreneurial skills. They could have felt that the income generated from selling items would not provide them with a steady income, therefore losing that sense of security. It is therefore suggested that similar skills development in future should provide participants with an immediate income to give them the opportunity to practice new skills while generating an income from it. This would mean that the facilitator should take on a leading role, but once the programme is running, that facilitator can distance him/herself from the programme.

The researcher is satisfied with the outcomes of the programme, and suggests that similar programmes be implemented in rural areas, to enable the rural poor to develop their entrepreneurial skills. A similar programme can aid in combating poverty and unemployment in rural as well as urban areas, something which is desperately needed in developing countries such as South Africa.

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ADDENDA

ADDENDUM 1

Interest survey

Addendum 1 was used before the training programme started. It was carried out in two neighbourhoods in Montagu, and was used to determine the interests regarding skills training amongst the community members. It was conducted on 14 March 2001.

A.   Demographic data

1.   Gender

MALE	FEMALE

2.   Age

18-25	
26-35	
36-45	
46-55	
56+	

B.   Educational qualifications

4.   What grade did you reach in your school training?

....

5.   Did you receive any other forms of training? If YES, what were they and how long was the training?

....
....
....

C.   Training interests

6.   Do you think training programmes are necessary in your community?

YES	NO

7.   What are your reasons for this?

....
....
....
....

D.   Specific training interests

8.   Would you be interested to receive training in any of the following programmes?

Fabric painting	
Sewing	
Business skills	
Wood painting	
Baking, cooking	
Communication skills	
Other	

9.   If you mentioned "other", what examples can you name in which you would like to receive additional training?

....

....

....

10.   How much time per week would you be prepared to spend in a training programme?

2 hours	
3 hours	
4 hours	
5 hours	
Full day	
More than one day	

11.   Would you make use of this training to help generate an income for yourself?

YES	NO

12.   What hobbies do you have?

....

....

....

....

ADDENDUM 2

Participant information

This participant information questionnaire was used during cycle two of the PAR cycles. This was to gather information regarding participants who had attended the information meeting at the start of the programme. Information gathered was biographical, education received, and hobbies, and whether they would be able to attend a course stretching over five consecutive days.

Name: ....

Age: ....

Work experience: ....

....

....

....

Family composition: ....

....

....

....

Hobbies:...

....

....

....

Would you be able to attend a 5-day course?: ....

Education received:..

....

....

....

ADDENDUM 3

Business training – evaluation form

Addendum 3 was used during cycle five at the end of the five-day business course. The evaluation form was part of the business course, and it was therefore not developed by the researcher. Participants were asked whether they had enjoyed the business course, and whether they felt they had learnt anything from it.

1. What, in terms of the course content, did you find most informative, and why?

....

....

2. Shortly describe how you experienced the presentation of the course.

....

....

....

3. What would you like to change about the course, and why?

....

....

....

4. What would you comment regarding the course material and contents?

....

....

....

5. To what degree did the course contribute to your development in terms of entrepreneurial development?

....

....

....

6. Name any aspects concerning business that you are not totally comfortable with, and for which you would like to gather additional information?

....

....

....

7. Would you attend another business course, and on which aspect would you like to concentrate?

....

....

ADDENDUM 4

Post-evaluation questionnaire (determine success of the programme)

Addendum 4 was used to conduct a post-evaluation of the programme that took place. It was used during cycle 15. The researcher wanted to evaluate whether the programme had been successful. This was done by identifying different indicators by which to measure this success, namely the facilitator used, training skills, products, finances and interests and group atmosphere.

1. Concerning the facilitator

1. Was the facilitator friendly? YES...... NO..........

2. If NO, please state your reasons for this. ....
....
....

3. Was the facilitator helpful? YES...... NO.........

4. If NO, please state your reasons for this. ....
....
....

5. Was the facilitator organised? YES...... NO.........

6. If no, please state your reasons for this. ....
....
....

7. Was the facilitator well informed? YES...... NO.........

8. If NO, please state your reasons for this. ....
....
....

9. Was the facilitator enthusiastic? YES....... NO.........

10. If NO, how would you describe the facilitator? ....
....
....

11. Did you see the facilitator as a motivational force? YES...... NO.........

12. If NO, what more did you expect from him/her? ....
....
....

13. Did the facilitator pay good attention to your needs? YES....... NO.........

14. Did the facilitator see to your problems which were identified? YES...... NO.........

15. If NO, what issues were ignored? ....
....
....

16. If you have any other comments regarding the facilitation of this course, please name them.
....
....
....

2. Training skills

1. Did you apply any of the training skills which you have acquired?　　YES......　　　　NO..........

IF YES:

2. Which did you apply? ....
....
....

3. What did you make? ....
....
....

4. For what reason did you make it? (ie. Presents, to sell). ....
....
....

5. For whom did you make it? ....
....
....

IF NO:

6. What reason(s) or problems can you give for not having applied any of the acquired skills.
(Personal, financial, logistics, family, etc). ....
....
....
....

7. Would you enter into a business partnership with someone else?　　　　YES.......　NO.......

8. If YES, are you able to transfer the knowledge learnt in the training to those working with you?
YES.........　　　NO..........

9. If NO, who would you ask to train them?...
....

3. Products

1. Do you sell any of your products?　　　　　　　　YES.......　　　　NO........

2. If YES, what do you sell? ....
....
....

3. Do you make use of a marketing strategy to market your products?　YES......　　　　NO..........

4. If YES, how do you advertise?...
....

5. If NO, how do you inform potential clients of your products? ....
....

6. Do you feel that there is sufficient interest in your products?   YES......   NO........

7. If NO, do you think you could generate more interest?   YES......   NO........

8. If YES, how would you do this?...
....
....

9. Where do you sell your products? ....
....
....

10. How often do you sell your products?..
....
....

11. To whom do your sell? ....
....
....

12. Where do you buy the stock for your products?..
....
....

13. How often do you buy stock?...
....

14. Have you experienced any problems when buying stock?   YES......   NO........
15. If YES, please name these problems. ....
....
....

4. Finances

1. How do you determine the price of a product? (ie. profit margin added on, labour included, own materials etc.) ....
....
....
....

2. What method of payment are your clients allowed to make use of? (credit, cash etc.)
....
....

3. Have you opened a separate savings account for the income from your products? YES.....NO......
4. If YES, where do you keep your money? ....

5. If NO, what do you do with the extra money that comes in as a result of sales? ....

....

....

5. Interests and group atmosphere

1. Did you have certain expectations about the project?   YES....   NO......

2. Were these expectations met?   YES......   NO.......

3. If NO, why was this?...

....

....

4. How did you experience the group atmosphere?..

....

5. Did you feel any pressure exerted by your fellow group members?   YES....   NO.......

6. If YES, how did you handle it?..

....

7. Did you feel any pressure exerted by the facilitator?   YES.......

NO........

8. If YES, how did you handle it?..

....

9. Was there group cohesion during the skills training?   YES......   NO.......

10. Was there opportunity for you to take part in a decision-making process?

YES........NO.........

ADDENDUM 5

Participant information of remaining eight participants

In order to compile Addendum 5, the questionnaire in Addendum 2 was again used for gathering participant information. Altogether 12 participants were interviewed. The data of four of the participants can be seen in the discussion of the case studies (see paragraph 4.4). The following data contains the data of the remaining eight participants.

Participant one

Participant one is female, 30 years of age and is single. She resides in Montagu with her mother, sister, brother, and two children, a daughter aged 11 and a son aged 6. Her home language is Afrikaans, and she completed school up until Grade 10. She was born in Montagu and has lived there all her life.

After leaving school, she started working in the restaurant industry in Montagu. She started off doing waitressing at the Avalon Springs, which are situated on the outskirts of Montagu, after which she became one of the receptionists there. At the time of the interview, she was not formally employed, and was considering working at the Langeberg Canning Company during the next season. The mother is the main breadwinner, supporting the whole family and the family therefore pools any possible income that they might generate. Even though she was not employed, the participant was part of a church organisation, known as the Youth Brigade. This movement caters for up to 80 children simultaneously. These children attend meeting where they learn life skills, and just socialise as a group.

The participant mentioned that she enjoyed doing needlework, sewing and reading, and that she was good at working with people. She enjoys socialising with others, and gets along well with most people.

One of the main reasons she gave as to why she thought that becoming part of the programme would be beneficial to her, was because she felt that she had a variety of skills, but she did not have the opportunity to utilise them all. She also felt that a business course would be ideal to help bridge the gap between being able to use skills to present or promote something, and having the ability to convert this ability into some form of personal income.

Participant two

Participant two is female, and 16 years of age at the time of the interview. She has lived in Montagu all her life, together with her parents and one sister. She was still at school, and therefore had no formal employment. Her financial support came from her parents, who are both employed at MAG.

Her first language is Afrikaans, and she is presently finishing Grade 11 at Ashton Secondary School.

She enjoys reading and enjoys writing. One of the reasons given by her for wanting to attend the programme was that she wanted to learn new skills, and to combine these with a business approach to generate an income. She felt that it was necessary to have some form of business background to understand how the industry works, and to find out how she could become an entrepreneur.

Participant three

Participant three is female, 43 years of age and married. She lives with her husband and two daughters, aged 18 and 16, in Montagu. She is formally employed at MAG, and works with her husband, who is the caretaker at the centre. Some of her duties are that of cleaning the place, and preparing food on large scale for groups who make use of the accommodation attached to the centre. Before she was employed at MAG, she worked as a till assistant in the fish shop in Montagu. She left school after completing Grade 8, and has worked in the Langeberg Canning Company for a few seasons.

She enjoys baking and cooking, and likes to do needlework in her free time. She said that she was interested in improving her sewing skills, as she felt that she could use this in her own home, and to help out friends. She was also interested in learning the finer skills of baking on large scale, as she could use this when groups came to the accommodation centre. She wanted to learn more about budgeting and pricing, mainly for personal use, but also for the possibility of her using her skills to generate some form of income.

Participant four

Participant four is female, 50 years of age and married. Her home language is Afrikaans, and she has been living in Montagu all her life. She lives with her husband and three children, two daughters and one son. She is the only participant who have not received any formal school training. At the time of the interview, she was not formally employed, but had worked in the Langeberg Canning Company for many seasons. For income she relies on her husband, who is also a part-time worker at the factory, and her eldest daughter who brings in an income from doing part-time work during the year.

Her hobbies include baking and cooking, sewing and working in the garden. She indicated that she wanted to join the programme to learn more sewing skills. She did not give any definite indication on wanting to start a business, but was interested in learning some business skills to help her budget better.

Participant five

Participant five is female, 22 years of age and single. Her home language is Afrikaans. She has lived in Montagu all her life, and presently resides with her parents, sister and aunt. She has no formal employment, but has worked in a hair salon in Ashton for five months, taking on the role as an apprentice. At present, she styles the hair of friends and family at a nominal fee and on an irregular basis. She left school in 1999, having completed Grade 10.

She sees herself as having a natural ability to work with hair, but also enjoys sewing, reading and drawing. She indicated that she would be interested in joining the programme, to learn new sewing skills, and to be able to broaden her business sense, as she wanted to further her career as a hairdresser, and convert to her skill into a small business.

Participant six

Participant six is female, 16 years of age and single. She attended the meeting with her sister, participant five. She was born in Montagu, and presently lives with her parents, older sister of 22 and her aunt. She is currently completing Grade 10, and therefore has no formal employment. Her financial stability comes from her parents, who support her while she is still at school.

Her hobbies include drawing, doing needlework and reading. She showed interest in learning the basic business skills, as she stated that she would like to use these in the near future when she was going to start her own small enterprise to generate an income. Even though she was still at school, she expressed her concern regarding finding employment in Montagu, and that she would therefore rely on her own skills to help her become an entrepreneur.

Besides doing business, she was eager to learn how to paint on fabric, and to learn how to use the finer sewing skills to produce items for herself, especially to use material on which she has painted.

Participant seven

Participant six is the only male that attended the meeting. He is 20 years old, and lives with his parents, brother of 16 and sister of 6 years. He was born in Montagu, and has lived there ever since. At the time of the meeting, he was not formally employed, but had already enjoyed a variety of working opportunities. He was the cashier at the local CNA store, after which he became a waiter and cashier at a coffee shop in Montagu. He also worked as a sales person in a clothing store, which had closed down.

He relies on his parents for financial support, and is continually looking for new ways to generate an income. He completed Grade 12 in 1999.

His hobbies include beadwork, photography, clothing design, and dancing. He sees himself as very creative, and he likes to try out new ideas and designs which he presents to potential customers.

He showed a lot of interest in joining the programme, mainly to increase his creative skills and to apply them, getting input from other sources. He wants to start up a small business, combining all elements of fashion to cater especially for dances, which are held in Montagu. He feels that he needs some form of business background that he can use to become an entrepreneur.
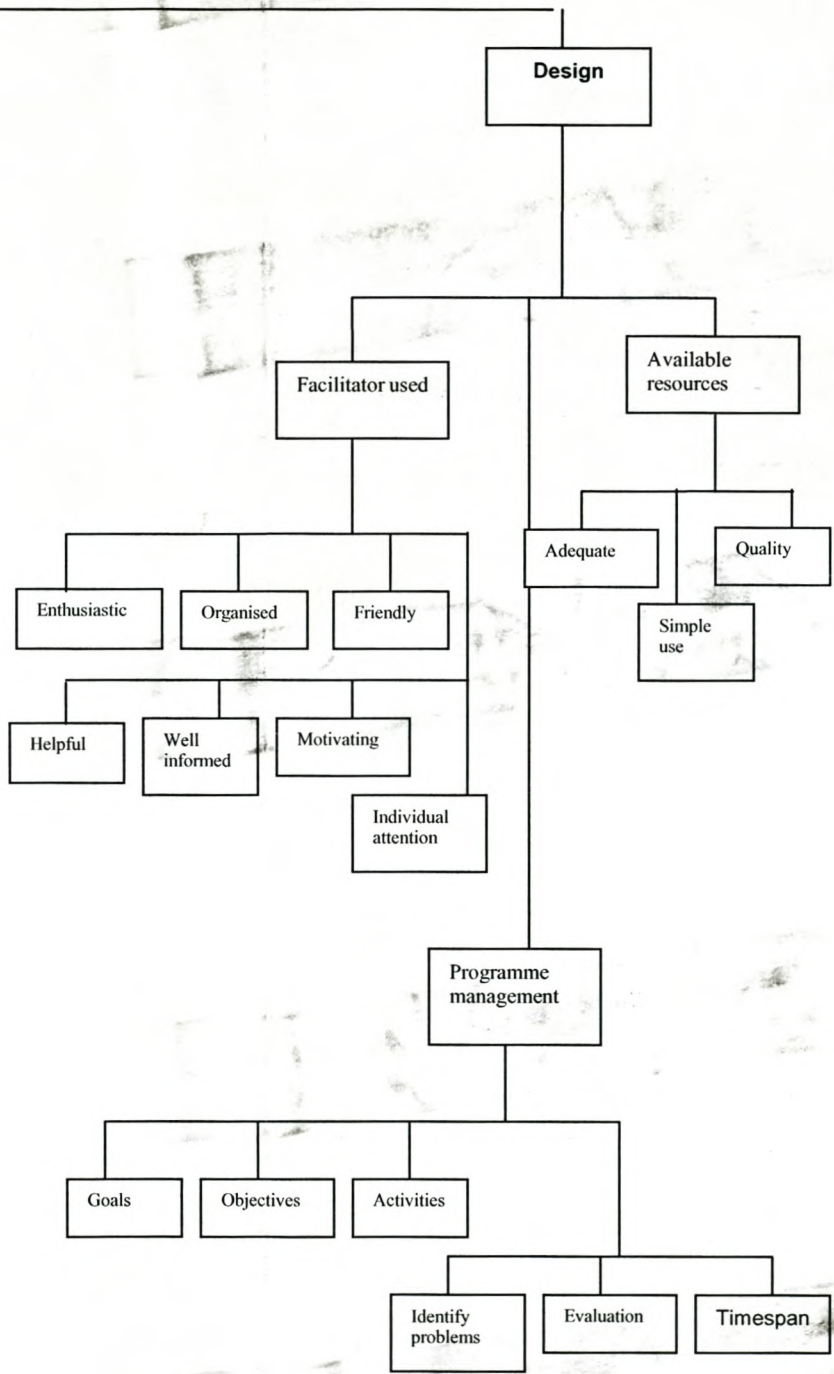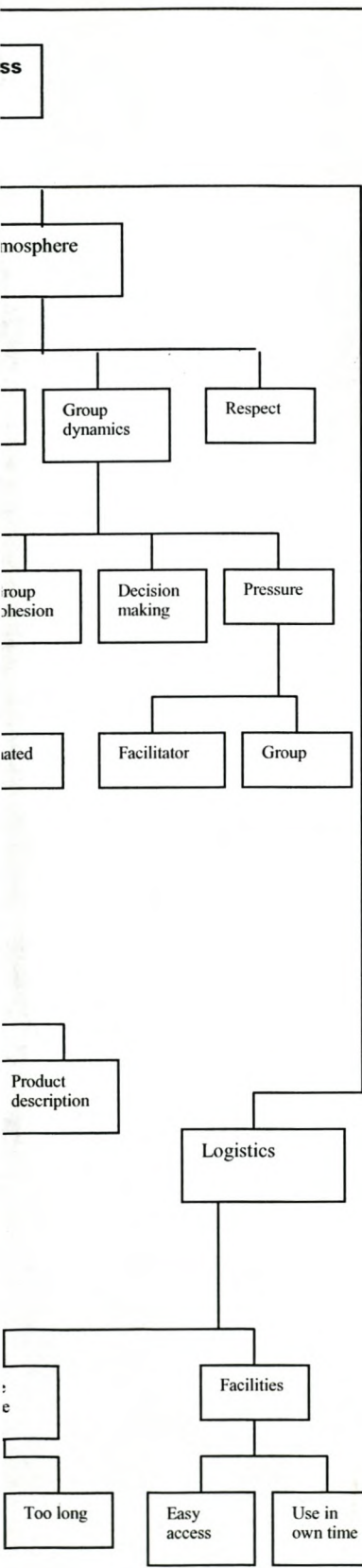
Participant eight

Participant eight female, 35 years of age and single. She has lived in Montagu since birth, and presently resides with her brother, aunt and son of 12. Her home language is Afrikaans, and she left school after completing Grade 8. She was not formally employed at the time of the interview, but she works in the Langeberg Canning Company during the season. Her main source of income is from the seasonal work, but she also gets financial support from her brother who is employed full-time at the same factory.

Her hobbies include sewing and baking, but she said that she would like to increase her handicraft skills, especially concentrating on sewing. She would also like to learn the finer side of business skills to enable her to use this in the household for budget purposes, and when she needed to start up some form of small business to generate additional income.

ADDENDUM 6

Dendrogram

URIAL
O SUCCESS

ss

Design

mosphere

Facilitator used

Available
resources

Group
dynamics

Respect

Adequate

Quality

roup
ohesion

Decision
making

Pressure

Enthusiastic

Organised

Friendly

Simple
use

ated

Facilitator

Group

Helpful

Well
informed

Motivating

Individual
attention

Product
description

Programme
management

Logistics

Goals

Objectives

Activities

Identify
problems

Evaluation

Timespan

Facilities

Too long

Easy
access

Use in
own time

ENTR
DEVELOPM

Worth

Knowledge transferred

Knowledge applied

Given advice

Personal purposes

Gifts

Home decor

Business practice

Orders

Buying stock

Pricing

Yes

No

Yes

No

Yes

Local

Other towns

Where

Frequency

Payment

Profit margin

Family

Friends

Other

Cash

Credit

Local

Out of town

Weekly

Monthly

Interest

Met expectations

Identify needs

Co

Yes

Problems

L

Job

Health

Family

Shar

Finances

Unmet needs

Others

Feasibility study

Business plan

Marke-ting

Clients

Own business

Partnership

Travel

Distance

Cost