

Identifying sensitive issues in education in Limpopo province, South Africa

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Researchers in the social sciences generally encounter problems in getting information when dealing with topics that are regarded as sensitive in school management. Principals regard certain issues as sensitive, and find it difficult to discuss them with researchers. We report on an investigation into such sensitive issues in Limpopo province, South Africa, as well as the reasons why principals regard them as sensitive. Interviews with 12 individual principals were conducted to gain an understanding of issues that they regard as sensitive. A 33 item self report questionnaire was administered to 180 principals drawn from 272 secondary schools. Results reveal a range of issues regarded as sensitive to report on that pervade the management of schools. Principals have reported on the various reasons why they regard each of the aspects as sensitive, thereby making it difficult for them to provide the required information. Analysis of the different sensitive issues shows that certain biographical characteristics are significant mediators in principals' perceptions of sensitive issues in school management. When researchers wish to elicit information on the issues identified in this study, they should consider methodological issues that may influence the investigation so that understanding and giving voice and visibility is not jeopardized.

Keywords: deceptive answers; educators charged; sensitive educational research; sensitive issues in education; sensitive research; social relations

Introduction

Many school principals in South Africa, particularly in rural areas, work under extremely stressful conditions which are often characterised by low staff morale, poor resources, inadequate facilities, mismanagement, social problems such as gangsterism and substance abuse, disillusioned learners (De Jong, 2000; Ebersohn & Eloff, 2002; Hayward, 1992), and teachers trying to cope with children in trauma or suffering emotionally from untold loss of family members from HIV&AIDS (Coombe, 2002). These conditions are not conducive to an effective teaching and learning environment. A great challenge that faced the education reform process in South Africa, after redressing the injustices of the apartheid regime, was the restoration of a culture of learning, teaching and services (Hayward, 1992).

Several investigations recently commissioned on the state of education in rural areas found that these areas have been seriously discriminated against in terms of finance, buildings and resources for schools (NECC, 1993a; 1993b). However, when conducting research on sensitive topics such as education in rural areas, a number of the assumptions on which social science research has been based are challenged. According to Lee (1993), research on sensitive topics tends to have two rather contradictory outcomes: (1) the difficulties associated with sensitive research tend to inhibit adequate conceptualisation and measurement, and (2) problems have also led to technical innovation in the form of imaginative methodological advances.

The problems and issues that arise at each stage of sensitive research take a variety of forms less commonly found in other kinds of studies, which may be methodological, technical, ethical, political or legal. Areas that are contentious or highly conflicting often produce research topics that are highly sensitive. When sensitive educational research is done where school principals are respondents, one would suspect that they find it difficult to respond, because they have much to lose in terms of status and reputation. This is because research in such situations can be regarded as

threatening by those involved in a conflict, for example, those who are in positions of power (Adler & Adler, 1993; Cole, Kemeny & Taylor, 1997). Those involved may be more likely to be untruthful or to give deceptive answers, or they may even refuse to answer (Lee, 1993) in order to keep themselves in their jobs or to save face. The methods of collecting data for such sensitive topics can therefore affect the accuracy of the answers, which is crucial given that the dissemination of invalid results and recommendations could lead to policy decisions that are not credible and are potentially harmful (Sieber & Stanley, 1988; Sieber 1993; Brewer, 1993; Lee, 1993; Reeser & Wertkin, 1997). Where problems arise in studying sensitive issues in education, researchers often find it difficult to produce valid and reliable research results, as such results are emotionally loaded, rarely discussed and may not be ignored (Sieber & Stanley, 1988; Eisner, 1991; Lee, 1993), since they address life problems.

Our main aim in the study was to ascertain which issues are sensitive for principals to report on and to identify reasons for sensitivity, thereby providing social researchers with an understanding of conditions of duress and adversity that exist in education that are potential methodological problems regarding the collection of valid and reliable information. Researchers experience problems in getting honest responses from participants about conditions of duress and adversity in education that they regard as sensitive. For social researchers, this study may provide valuable information on researching sensitive issues in school management, placing them in a better position to cope with the effects of sensitivity in research in education. Social researchers would be able to identify those issues and determine the most appropriate methodology for coping with the effects of sensitivity. We investigated a number of cases in school management where conditions of adversity and duress exist and assessed their effect on the responses of principals to sensitive research questions.

It was hypothesised that there are sensitive issues in school management that principals find difficult to provide information on. It was further hypothesised that the more sensitive or threatening the topic under examination, the more difficult it is for respondents to provide answers to the research questions.

Review of literature

Definition of sensitive research

Several researchers have attempted to define sensitive topics or research. According to Lee (1993: 4), the term 'sensitive research' refers to "research which potentially poses a substantial threat to those who are or have been involved in it". Some literature on sensitive research supports this conceptualisation by Lee. For example, Tourangeau and Smith (1996) indicate that a question is sensitive if it raises concerns about disapproval or other consequences (such as legal sanctions) for reporting truthfully or if the question itself is seen as an invasion of privacy or when it deals with things sacred to participants. Reeser and Wertkin (1997) studied the sharing of sensitive information with field instructors. According to these researchers, information is defined as sensitive if it entails personal or family problems, illness, or disability (e.g., criminal history, psychiatric diagnosis, or substance abuse).

Sieber (1993:3) defines socially sensitive research as "studies in which there are potential consequences or implications, either directly for the participants in the research or for the class of individuals represented by the research".

This definition introduces another approach of defining the concept 'sensitive topic': that of considering sensitivity in respect of possible consequences – sensitive topics are threatening because participation in research can have unwelcome consequences.

Lee's (1993) definition of sensitive research is inclusive. It refers to the threats or risk to those involved in the study and the problems encountered in the collection, recording and dissemination of research data. For the purposes of this article, we therefore regard the following as a working definition: Sensitive research topics are those topics that pose a potential threat in some way to those participating in the research – both the researcher and the researched.

Theories of sensitive research

The study looked at the question of whether sensitive research implies specific threats to the data collection methodology and the validity of the results, and if these do indeed exist, in what way they threaten the participants. The literature on sensitive questions demonstrates that the social desirability of the information being collected and the method of collecting such data can affect the accuracy of the answers that are obtained (Kilpatrick & Lockhart, 1991; Tourangeau & Smith, 1996). Where people are the subjects of research, their views of the researcher and the research itself will affect their responses and behaviour.

Henderson, Sampsel, Mayes and Oakley (1992) and Schlesinger and Devore (1994) examined how research is conducted in a multicultural society. They framed their discussion within the understanding of culturally sensitive research – research methods are developed in a culture that is dominant over other cultures. According to these researchers, applying research methods and techniques developed in a dominant culture can threaten the validity and generalizability of research conducted among other cultures. Ben David and Amit (1999) state that cultural self awareness helps prevent distorted perceptions of particular groups and helps individuals realize how much their own value, knowledge and bias affect perceptions and service delivery to different groups. Being culturally sensitive means understanding the values and reward systems of a given community (Hatrup & Bickel, 1993; Bickel & Hatrup, 1995). Research with culturally diverse clients would therefore require unique methodological considerations (Rodgers & Potocky, 1997).

Several sources (Tracy & Fox, 1981; Blair, Sudman, Bradburn & Stocking, 1977; Bradburn; Sudman; Blair & Stocking, 1978) indicate that the potential for response bias in surveys of sensitive information can be considered particularly problematic: random response errors reduce the reliability of measurements, and systematic response errors jeopardize the validity of measurements. Tracy and Fox (1981) further report that the differing propensities among respondents to under report or over report sensitive behaviours can lead to erroneous inferences regarding the extent and correlates of the behaviour. Consequently, such bias can vitiate the self report technique, a method that is frequently the only way to measure certain behaviours.

Method

Sample

A total of 12 public secondary school principals selected were given unstructured interviews. The sampling strategy, which produced a small sample in line with the statistical rules for optimal sample size (Bogdan & Biklen, 1998; Babbie & Mouton, 2001), was intended to produce a heterogeneous set of principals and thus enabling generalizability of the results, although it is impossible to evaluate the extent to which the sample was representative of the population (Babbie & Mouton, 2001).

A group of 180 public secondary school principals were selected through a purposive sampling procedure in the Northern Region and given self administered questionnaires. One hundred and fifty questionnaires were returned, providing a response rate of approximately 83% which we consider a very high return and provided a valid sample for the study.

Selection was determined by performance track record obtained from the Department of Education of matriculation results attained in the two years prior to the year of the study. Comprising the sample were 10 males: two came from schools regarded as most effective; two were from average performance schools; two were selected from schools regarded as ineffective and the other four came from areas other than the Northern Region, and two female principals, selected because they were the only two female principals available from the three in the region. Principals of special and combined schools were however, excluded subsequent to evident differences between the two types of schools.

Permission to collect data was granted by the Department of Education. Confidentiality for schools and individuals was assured. Each questionnaire was accompanied by a letter assuring prin

cipals that the survey was anonymous and was designed mainly to obtain an overall statistical picture. It was emphasised that participation was purely voluntary.

Questionnaire

A structured survey instrument, The School Management Sensitive Issues Questionnaire (SMSIQ) was developed following a literature review of the studies on sensitive research. Themes identified from semi structured interviews with 12 principals: (1) the school policy (learning teaching situation), (2) working conditions, (3) code of conduct for learners, (4) learner and educator discipline, (5) administrative activities, (6) school financial issues, (7) developmental appraisal, (8) moral issues and (9) social relations issues, were utilized as guides for the construction of 33 item SMSIQ for use with our sample of principals. Piloting of this questionnaire indicated that principals judged it to be suitable for use in respect of both content and language.

Questionnaires were completed anonymously, with respondents asked only to indicate details of (1) gender, (2) age, (3) length of teaching experience and (4) length of experience as a principal. Principals were asked to rate each of the questionnaire items on a five point Likert type scale measuring how each of those items was sensitive and why respondents thought each of the aspects was sensitive, thereby making it difficult for them to provide information on such aspects with 1 representing 'extremely sensitive' and 5 representing 'not at all sensitive'. They were requested to tick only one reason they considered the most appropriate for sensitivity from those indicated. Space was provided for them to identify any additional major issues they regarded sensitive to report on.

Analysis

Questionnaire data were entered into a data editor loaded with the Statistical Package for the Social Sciences (SPSS) 15.0 file for Windows. Although we had taken considerable care in entering the data from the study, we checked for errors that might have occurred during capture by examining the data set directly using the case summaries approach and running the procedure 'frequency', which produced a summary table of values for each variable.

The following SPSS procedures were used to develop a description of the characteristics of the respondents: frequencies, crosstabs, means, and graphs. Bivariate analyses were conducted to test for significance of the association between the variables using the chi square test.

Results

The results, obtained from the analysis of questionnaires completed by principals from secondary schools, are presented showing the main trends and patterns in the data.

The ranked results of issues in school management regarded as sensitive thereby making it difficult for principals to provide information on these issues during investigation by researchers are given in Table 1.

The results indicated that moral issues were the most sensitive issues in school management on which principals had difficulty in providing information to researchers. Of the moral issues identified, sexual abuse between educators and learners, as well as educators and learners with Acquired Immune Deficiency Syndrome (AIDS) were regarded as extremely sensitive.

Table 1 shows that AIDS related issues rated as the most sensitive in school management to provide information on during investigation by researchers. Reporting about educators with AIDS was rated the most sensitive while reporting about learners with AIDS was rated second. These are moral issues. The other moral issue rated as very sensitive on which to provide information during investigation by researchers was the exercise of corporal punishment (Table 1, ranked 3).

The majority of principals seemed to regard issues relating to the moral and personal integrity of their colleagues or educators as being sensitive. Items ranked 4 to 8 (Table 1) were on the personal integrity of principal's colleagues. More than half of the principals agreed that disclosing educators' personal problems was an extremely sensitive issue in school management. The other issues

regarded as sensitive, which are related to morality, were sexual abuse among fellow educators (Table 1, ranked 5); discussing sexual abuse between educators and learners (Table 1, ranked 13); exercise of corporal punishment (Table 1, ranked 3) and code of conduct regarding learner pregnancy (Table 1, ranked 17). Results show that discussing the record of sexual abuse cases among educators and learners was ranked 11.

Social relations and work related issues regarded as sensitive were identified. Ninety five per cent of the principals rated backbiting among educators as being sensitive to some degree (Table 1, ranked 6). Overall, principals perceived the provision of information on financial issues of the schools as sensitive. Handling the school's financial documents (Table 1, ranked 23) was perceived to be sensitive while the disclosure of sources of personal income was found to be not sensitive (Table 1, ranked 32).

Age was also identified as having a significant effect in responding to questions related to issues regarded as sensitive. A higher proportion of principals who were 50 years or younger found disciplinary issues sensitive to provide information on to researchers compared with those who were older than 50. Principals of 50 years of age or younger found educator's reasons for being absent, to be most sensitive, while religious matters policy was found to be least sensitive. Cross tabulations revealed significant differences for the principals of different ages in their rating of the item record of disciplinary procedure on educators charged with misconduct ($\chi^2 = 7.106; p < 0.05$; Cramer's $V = 0.218$).

While half of the respondents indicated that religious matters policy is sensitive to some degree, the other half indicated that this issue was not at all sensitive. Further analysis showed a significant age effect with more than half (56%) of the principals who were older than 50 years of age and regarded this issue as not at all sensitive. However, the reason principals provided for indicating that discussing religious matters with researchers was sensitive was that they felt it was a violation of their (constitutional) rights (Act 108 of 1996).

Experience as principals also showed a significant effect on responses to questions regarding the sensitivity of disciplinary issues. There are significant differences in the rating of this item by the principals of different years of experience as principals ($\chi^2 = 14.336, p < 0.05$, Cramer's $V = 0.309$), principals with more years of experience regarding this item as sensitive to report on. This may provide evidence that principals tend to view moral issues as being more sensitive as they grow older.

Issues that are regarded as not being very sensitive are mostly related to learners or the school: disclosing the sources of income (Table 1, ranked 32), coping with problems caused by educators (Table 1, ranked 31), records of learners' disciplinary problems (Table 1, ranked 30) and reasons for learner absenteeism.

Reasons for sensitivity

Respondents were asked to provide reasons why they regarded aspects of school management as sensitive, and why it was consequently difficult to make this public to researchers.

Fourteen out of the 33 items were regarded as sensitive because they dealt with confidential matters. There was one item for which an ambiguous indication of its sensitivity was given, namely, religious matters policy. Half the respondents regarded the issue as sensitive while the other half regarded the issue as not at all sensitive. The reason principals provided for this was that they felt it was a violation of their (constitutional) rights (Act 108 of 1996). The constitution of this country allows individuals to belong to the religion of their choice and consequently learners or educators should not be forced to follow the particular religious policies of a given school.

Consistent with the literature, principals gave the following as the main reasons why they regarded issues as sensitive, and therefore difficult for them to provide information on: confidentiality, intrusion of privacy, fear of legal sanction and violation of rights. Matters personal to the educator were found to be most sensitive because of their intrusive nature. Educators felt that their personal

Table 1. Rank order of sensitivity issues in school management (raw percentages)

Rank order	Sensitivity issue	Extremely sensitive	Very sensitive	Moderately sensitive	Slightly sensitive	Not at all sensitive
1.	Educator/s with AIDS	58	17	5	5	15
2.	Learner/s with AIDS	57	16	7	4	15
3.	Exercise of corporal punishment	56	15	4	7	18
4.	Disclosing educators' personal problems	55	31	7	4	3
5.	Sexual abuse among fellow educators	42	27	9	3	18
6.	Backbiting among educators	39	26	20	11	5
7.	Disclosing information about educators' salary issues	36	35	12	8	9
8.	Records of educators found guilty of misconduct	36	32	11	8	13
9.	Lack of text and prescribed books	36	23	9	3	28
10.	Records of disciplinary procedure on educators charged for misconduct	34	36	11	6	13
11.	Record of sexual abuse cases among educators and learners	32	32	7	7	22
12.	Late delivery of stationery, text and prescribed books	32	23	14	9	22
13.	Discussing sexual abuse between educators and learners	26	28	21	8	17
14.	Learner drug use	22	35	9	14	20
15.	Involvement in serious educator disciplinary situation	21	36	17	15	11
16.	Influence on labour unions	20	19	26	17	19
17.	Code of conduct for learners regarding learner pregnancies	17	28	23	10	22
18.	Educators arriving late for school	16	20	17	24	23
19.	Educator reasons for being absent	16	31	22	23	8
20.	Educators absence records	15	23	25	19	18
21.	Disclosing information about lazy teachers	15	31	19	15	19
22.	Discussing educator's developmental appraisal performance indicators	15	26	29	11	20
23.	Handling school's financial affairs	14	31	22	11	21
24.	Making learner performance records available to researchers	14	13	20	14	39
25.	Disclosing financial documents (receipt/cheque books, audit report, expenditure receipts)	13	28	15	7	38
26.	Conflicts among educators	13	28	20	22	17
27.	Lack of discipline among educators	12	31	19	21	17
28.	Record of disciplinary action for learners	11	26	30	12	21
29.	Reasons for learner absenteeism	9	11	24	21	36
30.	Record of learners' disciplinary problems	9	25	31	19	16
31.	Coping with problems caused by educators	8	26	37	16	13
32.	Disclosing the sources of income	7	17	21	17	38
33.	Religious matters policy	6	10	17	17	50

security was jeopardized. Issues prohibited by law are sensitive to being researched because of the threat they pose to the educators' work situation and the legal implications they entail.

Discussion and conclusion

The main aim of this study was to identify sensitive issues in school management which principals find difficult to discuss with researchers. We investigated why principals regarded some issues of school management as sensitive thereby making it difficult for them to report on. The findings reveal that principals of secondary schools find several issues sensitive. The results thus confirm the hypothesis that there are sensitive issues in school management that principals find difficult to provide information on.

In support of this conclusion, results show that AIDS related issues are the most sensitive issues in school management on which principals have difficulty in providing information to researchers. More than half the principals regard providing information about educators and learners with AIDS

as an extremely sensitive issue. As the National Education Policy Act 27 of 1996 (6) (6.1) and (6.5) prohibits discussions about someone who has been positively identified as having an infection of the HIV&AIDS virus (National Department of Education, 1996), such issues are understandably considered sensitive by principals, particularly if those concerned have not yet revealed their status. According to these sections, unauthorised disclosure of HIV&AIDS related information in which students may be socially stigmatised or ostracised (Hepburn, 2002; Sephedhi, Montsi & Mpofu, 2008), could give rise to legal liability. The inclusion of a chapter about AIDS policy at schools in the National Education Policy Act 27 of 1996 is further indication of the sensitivity with which this issue is being handled at higher management levels of schools. It could therefore be difficult for a researcher to find a research method to collect such sensitive data from respondents who may not readily provide it.

The results reveal that moral issues, in particular sexual matters, are generally perceived to be sensitive, and when they involve educators, one would expect it to be a sensitive issue for principals to talk about. It is regarded as a serious misconduct if an educator is found guilty of sexual abuse of another employee (Section 17 (1) (b) of Employment of Educators Act 76 of 1998) as there may be unpleasant repercussions for the educator and the school.

Principals agree that since corporal punishment is morally wrong, reporting on it is sensitive (Table 1, ranked 3). There are reports of educators who have lost their jobs because they have been found guilty of applying corporal punishment (Musetha, 2002; Govender, 2005). Given such reports about corporal punishment it is understandable that principals should rate corporal punishment as a sensitive issue in school management.

These findings are in agreement with results of other studies which have examined some of these response correlates of sensitive topic research (Brzuzu, Ault & Segal, 1997; Jansen & Davis, 1998). When researchers aim to capture the complexity of sensitive everyday life experiences with the goal of understanding the perspectives of those who live them, they need to consider methodological issues that may influence the investigation so that validity of results is not threatened. The results are therefore worth noting if we consider the fact that the perceived normative threat of a topic influences responses to questions – the perceived threat acts as a gatekeeper to prevent further questions (Everhart, 1975; Bradburn *et al.*, 1978). Researchers should also consider that principals are also bound by the code of ethics with regard to reporting on information about the moral behaviour of the educator (Johnson, Livingstone, Schwartz & Slate, 2000) during collection of data. This too may influence their responses.

These findings provide evidence that in school management, social researchers face a complex methodological problem of researching sensitive issues. Threatening items that ask about issues regarded as sensitive cause principals to withhold information or make them find it difficult to provide honest answers to questions from researchers. Researchers may find it difficult to get honest answers from respondents who, due to sensitivity of the questions, may be reactive and may therefore not produce valid and reliable data. We assume that sensitive research in education affects the research methodology that can be used to obtain reliable data. We assume that sensitive research in education affects the research methodology that can be used to obtain reliable data. Researchers need to consider methodological issues that may influence the investigation of issues identified in this study so that understanding and giving voice and visibility is not threatened.

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