Implementing Preventive Education about HIV/AIDS through Physical Education in Zambia: The Response of Teachers

By

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Abstract

Governments, United Nations (UN) agencies and international and local non-governmental organizations (NGOs) have mounted a concerted effort to remobilize sport as a vehicle for broad, sustainable social development. This resonates with the call by the UN Inter-agency Task Force for sport to be a key component in national and international development objectives. Missing in these efforts is an explicit focus on physical education within state schools, which still enroll most children in the global South. This study focuses on research into one of the few instances where physical education within the national curriculum is being revitalized as part of this growing interest in leveraging the appeal of sport and play as a means to address social development challenges such as HIV/AIDS. The study examines the response to the Zambian government’s 2006 Declaration of Mandatory Physical Education (with a preventive education focus on HIV/AIDS) by personnel charged with its implementation. The decree directed personnel to immediately begin implementing the teaching of physical education in all Basic and Secondary schools in Zambia to “ensure physical fitness and the enhancement of values, skills and holistic development of the learner” (Ministry of Education, 2006).
The study examined the response of 17 teachers and education administrators from Lusaka province, Zambia. The interviews were conducted between September and December 2009. The purpose of the study was to: 1) evaluate the implementation of the Presidential Decree on physical education as a strategy for addressing HIV/AIDS through Physical Education and Traditional Zambian Games; 2) explore and understand the response of teachers and administrators to the implementation of the 2006 Presidential Decree on physical education; 3) explore how the school context influences the implementation of the Presidential Decree; and 4) map a critical path of key personnel and their resource requirements, and make recommendations for strengthening the effectiveness of HIV prevention education.

Drawing on education policy implementation literature, this study provides an analysis of the rising influence of the sport for development movement and of the ways in which physical education and sport may address HIV/AIDS within national education in Zambia. The findings of the study reveal promising signs for the potential of physical education, and of particularly traditional games, for student engagement and for addressing HIV/AIDS. Yet these promising signs are undermined by poor planning and support from the education bureaucracy, deficiencies that stem from years of neglect of, until recently, non-examinable subjects such as physical education. The findings confirm that the literature on education policy implementation drawn mostly from the global North is just as applicable to education sectors in the global South.


**Acknowledgments**

_Ever since I started working, I have had a cause, absent or missing history. The masses on the streets, in the fields, in factories, or even at home have their own history, a history that once enriched humanity. How can we now revive their roles? How do we restore their positive and constructive engagement in life? I believe they first have to be aware of who they were, and what they have presented to life._

_A connection between the man of today and the man of yesterday has to be established for the man of tomorrow to come forth._

_That is my cause._

—Shadi Abdel Salam (1930–86)

This thesis is dedicated to my late grandfathers Donald Kawesha and Joseph Njelesani who, through our many conversations on the verandah in Lusaka and in the village of Kabulukutu, respectively, engaged me in many sociological debates about humanity, values and the need to pay attention to one’s history if one is to move forward in life. For me, Shadi Salam’s quote above captures our many conversations that I now regard as the foundations for the development of my ‘sociological imagination’. In these conversations I learnt about respect for all, regardless of their station in life, and to look at life as a journey, remembering those you encounter along the way.

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enjoy our time together and how we can talk about anything! Thank you for always wanting the best for us and for giving us the platform to pursue our dreams. Your stories and guidance of respect for all, regardless of their status, the need for humility and for remembering where we come from have served me well since leaving home at 14 for boarding school. The talk about always maintaining family standards and ‘ifyawamisha efya tu linga’ (which never gets tired, by the way) does indeed work, even thousands of kilometres away in Canada.

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Ba Shi Kawesha

Don
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Chapter One:

Introduction

1.1 Introduction: HIV/AIDS, State Education, Physical Education and Traditional Games

As HIV/AIDS enters its fourth decade, the disease continues to claim the lives of millions across the world. Fortunately, the rates at which lives are being lost in countries severely affected by the disease, particularly in sub-Saharan Africa, have begun to stabilize. In some cases, overall infection and prevalence rates have even declined (MDG Progress Report, 2008; UNAIDS, 2002). These gains have resulted from a number of factors, such as the advent of life-saving medications like anti-retrovirals (ARVs) and, a greater awareness of preventive measures achieved with the help of innovative responses (theatre and sport and population-specific approaches) grounded in a greater appreciation of the roles that culture and social-political contexts play in how individuals and societies respond to the threat of HIV/AIDS (Airhihenbuwa and Webster, 2004). Zambia, like many countries in sub-Saharan Africa, has had to contend with the devastating effects of HIV/AIDS with thousands of lives lost, a significant orphan population and the fracturing and reorganization of social structures. As countries like Zambia confront the realities of HIV/AIDS, it has become apparent that addressing and responding to the challenges of the disease concern not only the persons affected and their medical care providers (if they have access to any) but also the larger society. It is the realization that all sectors of society have a role to play that has given rise to civil society organizations and national education sectors as vital stakeholders in the response to HIV/AIDS and in the prevention of the disease’s further spread.

Through their Departments or Ministries of Education countries have responded by enacting HIV/AIDS workplace policies and by revising curricula to include information about HIV. While these efforts have led to an increased awareness of HIV/AIDS, critics have argued that awareness alone, while crucial in the seminal stages of an epidemic, is insufficient in its later and mature phases. Such critiques have been instrumental in rethinking the behavioural change model. Briefly defined, conduct-focused models are based on the assumption that giving correct information about transmission and prevention will lead to behavioural change (UNAIDS, 1999). This
model and other such strategies are being abandoned in favour of more participatory approaches that promote the active involvement of individuals and communities. Research suggests that communities and individuals need to be empowered to confront social structures that limit their abilities to adequately address HIV/AIDS (Airhihenbuwa and Webster, 2004; Bajaj, 2009; King, 2004; Preece and Ntseane, 2004; UNAIDS, 1999). Freire’s (1972) notion of ‘education for critical consciousness’ is salient here as it not only contributes to a more holistic development of the learner but can lead to enhanced critical awareness and the ability to address social and cultural structures that undermine individual and community efforts to adequately address HIV/AIDS. In a comparative case study of public and alternative (private) schools, Bajaj (2009) examines how one private school in Zambia has attempted to resist and transform unequal gender relations through its educational policies, pedagogy¹ and other practices in the context of economic decline and the HIV/AIDS pandemic, both of which have had an adverse impact on women in Zambia (p.489). Applying the ‘undoing gender’ perspective, Bajaj (2009) explores the relationship between educational policies and ideologies at the macro level and pedagogies and practices at the micro level. The concept of ‘undoing gender’, when examined alongside larger structures of material inequalities, provides a productive starting point for understanding the role of gender and schooling, and for the prospects for greater gender equity in global contexts (p.485). This case study is particularly useful to my own work here as it demonstrates the potential for critical awareness to disrupt patriarchal customs and practices that undermine HIV/AIDS prevention efforts in the setting of Zambian schools. Further, Bajaj’s (2009) study reinforces the need to pay particular attention to the teaching environment within schools, as it sheds light on how principles and values within a school can complement efforts to address HIV/AIDS.

¹ Pedagogy is defined as “the method and practice of teaching, especially as an academic subject or theoretical concept” (Oxford Dictionaries, 2010). Denzin and Lincoln (2008) define pedagogy as “teaching in the way that leads” (p.7). There are different types of pedagogies, and in this study I consider physical education pedagogy to have elements of critical education, as the teaching of physical education and traditional games in certain contexts can disrupt those hegemonic cultural and educational practices that reproduce legacies of colonialism and the subjugation of individuals (adapted from Giroux and Giroux, 2005, in Denzin et al., 2008, p.8). This is exemplified by games and practices that foster collaboration and interaction between boys and girls in the context of a society that continually thwarts girls’ participation in sports and physical activity.
The current study picks up from these conclusions and explores how sport and physical education are being used as part of HIV prevention education in Zambian state schools by physical education teachers. HIV prevention education offers learning opportunities for all to develop the knowledge, skills, competencies, values and attitudes that will limit the transmission and impact of the pandemic (UNESCO, 2006). In this study I argue that physical education can be used for developing critical awareness. The responses offered by research participants further suggest that physical education can constitute a form of resistance and can be disruptive of prevailing cultural norms with regards to prescribed gender roles. When appropriately implemented, sport and physical education can encompass learners’ active engagement in the spirit of Freire’s (1972) education for critical awareness. ‘Appropriate implementation’ refers to the teaching of physical activities that are developmentally appropriate for children and supervised by a qualified individual in a safe and supportive environment. Sport and physical education for HIV prevention as currently implemented in Zambian schools constitute a departure from the dominant, and more didactic, mode of teaching prominent within Zambian state education. Indeed, sport and physical education can contribute to greater critical consciousness in large part because it allows young people to discuss the often taboo subject of sex and to challenge long-held beliefs about the roles of boys and girls in society. The convening nature of sport and play means that many individuals are drawn into the activities (either as participants or as observers), and in the process of these interactions, barriers such as stigma can be addressed. The use of sport and play to address HIV/AIDS has largely been undertaken by non-governmental organizations (NGOs) working in local communities. The majority of programs engage young people in after-school activities that provide opportunities for play and that aim to empower young people to address challenges of social development such as poverty, unemployment and HIV/AIDS. These programs are delivered mainly through a peer model, which is significant especially when discussing subjects such as sexuality, whose open discussion between adults and young people is deemed culturally inappropriate. The responses of sport-related NGOs to HIV/AIDS form part of a larger movement commonly referred to as ‘sport for development’.² This movement generally focuses on

² This movement is also referred to as the sport for development and peace movement (SDP), as
sport and play as part of community development, as opposed to institutional education initiatives (Njelesani, 2011). Hayhurst (2011) suggests that sport for development is perhaps more distinctive than other social terrains because it attempts to funnel its objectives through various channels, such as education, health initiatives, foreign policy, social services and sport itself (p.22). Perhaps the most remarkable aspects of the sport for development movement relate to the scale, locations and type of organizations (local and international) that operate under its umbrella. While sport, play and physical education are central to this study, the study itself is not an examination of their effectiveness or of its merits for HIV/AIDS prevention. The study is concerned with the broad and interrelated issues of responses to HIV/AIDS as manifested in state education policy and physical education teacher training and administration. Closely related to these issues is the use of traditional Zambian games, which must be understood in the context of increasing national interest in Zambian culture and customs. These issues are explored against the sociopolitical backdrop of international (neocolonial) development strategies such as structural adjustment programs (SAPs) and the increasing influence of sport as a tool to meet the social development challenges of HIV/AIDS, gender inequality and access to education.

Given the burgeoning nature of the sport for development movement, it is notable that the application of its approaches in national education remains underrepresented in the sport for development literature. This study contributes to this gap in the literature as it enhances our understanding of how national education sectors can serve as avenues for meeting sport for development objectives, specifically that of HIV prevention. In the broader education literature, the study contributes to our understanding of how education policies are developed and enacted within the global South. Additionally, given that physical education remains a low-priority subject in most education sectors—as evidenced by the allocation of resources (administrative, financial, human)—very little is known about how the education bureaucracy supports (or not) subjects such as physical education within the global South. Pivotal to this understanding are the personnel charged with teaching physical education and their perceptions of what factors within the school some organizations under this banner seek to contribute to peace and reconciliation through sport (Kidd, 2008).
and education hierarchies contribute to successful teaching outcomes with regards to HIV/AIDS. Added to this are the questions of teacher training and of how governments prepare frontline teachers to address HIV/AIDS through physical education. The study thus partially addresses education quality, which is timely given that Zambia is close to achieving the Millennium Development Goal (MDG) on education (De Kemp et al., 2008; DfID, 2011; JCTR, 2011). As a signatory to the Millennium Development Goals, Zambia has committed itself to achieving universal primary education by 2015 and has made significant progress towards meeting this goal through the reintroduction of Free Basic Education in 2002 and through substantive investments in infrastructure. These achievements have been reflected by greater enrollment rates, but as we approach 2015, attention is shifting from enrollment to education quality. This study is therefore timely as it gets to the heart of teacher instruction and inspection, both of which are vital for education quality, in a subject that until recently garnered little attention on the school timetable.

To address the gaps in the literature, I draw on my positionality as a male Zambian Canadian with a history of involvement in the sport and physical education community in Zambia. As an indigenous scholar, I utilize my insights in the manner that Kidd (2008) describes as that of a moral entrepreneur—an advocate and organizer. These insights reveal a myriad of power relations in the education bureaucracy, and, significantly, they reveal contradictions among stated policies, bureaucratic priorities and experiences within schools, much as did Bajaj’s (2009) observations of the school environment in state schools.

In sum, the study focuses on policy development, promulgation and ‘take-up’ within the Ministry of Education and the responses of teachers. Specifically, the study looks at the 2006 Presidential Decree that made compulsory the instruction of physical education with components on HIV/AIDS, as well as at how teachers and education personnel have responded to the decree. The findings of this study in turn benefit the broader sport for development movement as they provide much-needed evidence for the burgeoning sector. Specific to Zambia, the study informs our understanding of how physical education can be used to address HIV/AIDS in a sector that enrolls more than 1.5 million students.
1.2 Zambia Background

Zambia is a landlocked country in southern Africa with more than seventy tribes. The country gained independence from British colonial rule in 1964. At the time of independence, Zambia was the third-largest copper producer in the world and considered a wealthy, middle-income country. Forty-five years later and with a population of approximately 13 million, Zambia is ranked at place 164 of the 179 countries in the United Nations Human Development Report (2011).

Significant in Zambia’s history since independence are the legacy of a one-party state that lasted twenty-seven years; its opposition to apartheid in South Africa (it served as the ANC headquarters during the apartheid era); the decline of copper prices in the early 1970s; structural adjustment programs of the IMF and the World Bank in the early 1980s; the widespread impact of AIDS in the early 1990s; a return to multi-party democracy in 1991; the emergence of China as an alternative development partner; and the attainment of the Highly Indebted Poor Countries (HIPC) completion point of the IMF and the resultant debt relief (Goldsbrough and Cheelo, 2007). Equally significant in the country’s history are the legacies of colonialism, which are manifest in the contemporary organization of civic and public life. For example, Christianity is the dominant religion, and recently the country enacted legislation declaring Zambia a Christian nation, although Christianity was only introduced by European colonial explorers in the 19th century. Schools are largely administered along the lines of pre-independence days. Zambian physical education has its origins in ‘muscular Christianity’, whose basic premise was that participation in sport could contribute to the development of Christian morality, physical fitness and manly character (Watson et al., 2005). Many people refer to the government as BOMA, which in colonial times referred to the offices of the British Overseas Military Administration, the political authority in towns across the country.

1.3 Impact of HIV/AIDS on Zambian Education

The impact of the AIDS epidemic on education systems has been well documented (Chelala, 2009; Coombe and Kelly, 2001; Gachuhi, 1999; Kelly, 2000; Rena, 2008). For example, as early as 2002 Coombe reported that at least 12% of South Africa's 375,000 teachers were HIV positive, the implication being that more than 53,000
educators would die by 2010. Specific to Zambia, 4,000 teachers died between 2003 and 2007, and 650 teachers had been lost by November of 2007 (Butty, 2007). Chelala (2009) reports two teachers dying for every one who graduated from a teacher training school in Zambia, and, citing statistics from the Zambian Ministry of Education, claims that a teacher died every day from AIDS-related diseases in a single year at the height of the epidemic. Chelala (2009) further reminds readers of these statistics’ implications by noting that HIV/AIDS affects not only access to education but also the quality and management of education at local, regional and national levels. UNESCO (2004) notes that children are constantly losing teachers at school, and in some areas, classes and even whole schools are closing, with a devastating effect on education.

The impact of AIDS on education continues despite declining national HIV prevalence rates in sub-Saharan countries. For example, in Zambia the rates have declined to 14.3% from highs of 21.5% (MDG Progress Report, 2008; UNAIDS, 2002). UNESCO (2006) and many other organizations advocate HIV/AIDS prevention education to address these challenges. Prevention education offers opportunities for all to develop the knowledge, skills, competencies, values and attitudes that will limit the transmission and impact of the pandemic. Coombe and Kelly (2001) note that “education tends to enhance the potential to make discerning use of information and to plan for the future and to accelerate favorable socio-cultural changes” (p.441). In this study I argue that the possibility inherent in physical education to foster critical awareness, combined with concrete HIV-prevention education, can be instrumental to challenging and resisting cultural practices and beliefs around gender that hamper efforts to comprehensively address HIV. In this regard, policies such as prevention education and revised institutional practices like physical education and sport for HIV prevention, which contribute to a strengthened education sector, should be supported, especially as the education sector remains a vital component in long-term strategies for reversing the impact of AIDS.

Most past HIV/AIDS policies were rooted in biomedical and behavioural frameworks, in which the individual and the processes of infection and transmission received priority over social contexts in both explanation and response (Wolfers, 2000). Such frameworks fit with the concept of logical positivism, in which a truth is assumed to
be unchangeable and unrelated to human perception (Airhihenbuwa and Webster, 2004; Wolffers, 2000). Such biomedical frameworks often exclude other knowledges of and approaches to framing the challenge of AIDS and its address (King, 1999), stigmatizing affected and infected people as victims in discursive frameworks within the education system and denying the validity of their own social knowledge.

As a consequence, there is a gap in the education and policy literature. How AIDS is conceptualized within education may not be congruent with the lived experiences of Zambian students and teachers. Bajaj (2008) suggests that young people’s experiences are central to understanding the disease and its implications for youth and the institutions, primarily schools, in which they participate (p.308). This leads Bajaj (2008) to conclude that the role and delivery of schooling must be re-examined, especially given high teacher mortality, teacher misinformation and young people’s exposure to the disease outside of schools. Students’ diverse experiences in and outside school shape their knowledge and beliefs about HIV/AIDS at a time when all social institutions in Zambia have been affected by the disease. In this study I show how physical education and traditional games are increasingly identified as subjects garnering student engagement. This means that physical education and traditional games should be seen as opportunities for Zambian students to share their experiences to help understand the implications of HIV/AIDS on generations that have grown up with the disease as a daily reality.

1.4 Sport for Development

The International Platform for Sport and Development notes that ‘sport for development’ essentially refers to the use of sport as tool for development and peace.³ Proponents thus highlight sport’s utility towards meeting social development targets. These targets generally fall into three categories: social issues, health promotion and economic development (United Nations Inter-agency Task Force, 2003). Giuliannotti (2004) argues that this perspective of sport as a tool for development and peace is functionalist in that it assumes that sport meets crucial social needs and thus constitutes a powerful and positive force for social integration (p.356).

Sport for development can be distinguished from ‘sport development’ in that it

seeks out those not already involved; it is furthermore unconcerned about whether participants ever become involved in organized training and competition (Kidd, 2008, p.373). Whereas sport development is largely a project of sporting organizations, sport for development is increasingly pursued by NGOs in partnership with government Departments of Education and Health.

Sport for development is an emergent area, particularly as it relates to efforts championed by the United Nations in addressing the MDGs. I make this distinction because sport and recreation, going back to middle-class reformers, has been used as a tool for social development for several decades. A distinguishing feature of the current use of sport for social development lies in the rapid explosion of the agencies and organizations involved, the tremendous appeal it has for youth volunteering, the financial support it enjoys from powerful international sports federations and the extent to which it has been championed by the United Nations, its agencies and significant partners (Kidd, 2008, p.371).

Missing in these efforts is an explicit focus on physical education within state schools, which still enroll most children in the global South. The International Platform for Sport and Development contends that providing physical education both inside and outside of schools is crucial in helping young people learn and develop life skills (Kidd, 2008). Zambia is in a unique position, as the growth of sport for development in local communities across the country and the remobilization of sport has been coupled with the 2006 Declaration of Physical Education as a compulsory subject for all levels of the education sector, with the subject seen as a means for the “enhancement of values, skills and a holistic development of the learner” (Ministry of Education, 2006) and as a way to address the challenges of HIV/AIDS. The decree directs administrators and teachers to:

With immediate effect implement the teaching of Physical Education as contained in the syllabi …. Physical Education Officers, District Education Board Secretaries and their Standards Officers should personally monitor the teaching of Physical Education to all pupils and students and ensure the appearance of Physical Education on School Timetables in all the Institutions of Learning without fail. Schools should not replace Physical Education with other subjects.

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4 Ibid.
Please note that the teaching of Physical Education is to ensure **Physical Fitness** of the Learner and need not involve expensive equipment. Additionally it need not necessarily be taught for examination purposes only but should be taught for the *enhancement of values, skills and a holistic development of the learner*. Heads of institutions are directed to personally ensure the implementation of teaching of Physical Education in your institutions of learning. (Ministry of Education, 2006)

It is worth noting that three years after the decree was proclaimed, physical education became an examinable subject, with approximately 340,000 Grade 7 students in 2009 taking a physical education exam (Ministry of Education, 2010).

The decree itself resulted in part from the UN’s recognition that participation in sport contributes to HIV/AIDS prevention by enhancing decision-making and coping skills, as well as by empowering girls to protect boundaries and imbuing boys with sexual responsibility. Available research in this field further indicates that in certain contexts in low-income countries, and when appropriately implemented, participation in sport contributes to the inclusion of people with disabilities, as well as to health awareness and promotion. Despite the prevalence of these programs, their integration into national education sectors and program planning, particularly with regards to the inclusion of people with disabilities, remains limited. The 2006 declaration aims to improve teacher education in physical education by including teachings on anti-stigmatization, gender equity and preventive measures concerning HIV/AIDS. The declaration resonates with the recent call for “a rethinking of current pedagogical practices and the ‘banking relationship’ between teacher and student” (Heinecke et al., 2001).

The present study responds to the recent call for scholars and activists to become familiar with the colonizing tendencies within sport for development initiatives (Darnell and Hayhurst, 2011). It contributes to this literature by illuminating some of these colonizing tendencies, or the ‘colonial residue’, and by providing evidence of how indigenous scholars can begin to dislocate these tendencies. It also underlines the need to be attuned to some of the associated insider/outsider dynamics when conducting research in sport for development activities and beyond, in qualitative research in general. In this regard the study contributes to the development of a critical methodology for sport for
development scholarship and practice that supports decolonization. In this study I use Darnell and Hayhurst’s (2011) conceptualization of decolonization, “not in reference to an historical era, but to speak of the socio-political importance and the process of challenging colonial authority and supporting self-determination … in regard to sport and international development” (p.184).

1.5 Research Study and Purpose

The overarching focus of this study is the development, announcement and implementation of the 2006 Presidential Decree about Physical Education. Guided by a sociological approach, the study consisted of interviews with 17 teachers and education administrators from Lusaka Province, examining how these individuals have responded to the Presidential Decree. The research participants represented all four education districts of Lusaka Province and included both rural and urban school representation from each school district. The study methodology draws on tenets of critical theory, ethnography, feminist, postcolonial and educational policy constructs. In addition to interviews, the study primarily employs document and policy analyses as its methods. Using reflexivity, the study is informed by observations from my participation in physical education workshops. Additionally, the study is informed by my positionality as a male bearer of transnational power.

1.5.1 Research Objectives

The study aimed to address four research objectives:

1. To evaluate the implementation of the Presidential Decree as a strategy for addressing HIV/AIDS.
2. To explore and understand the response of teachers and administrators to the implementation of the 2006 Presidential Decree.
3. To explore how the school context influences the implementation of the Presidential Decree; and
4. To map a critical path of key personnel and their resource requirements, and to make recommendations for strengthening the effectiveness of HIV prevention education.

1.6 Chapter Overview
This thesis is composed of eight chapters. Chapter 2 provides an overview of the literature that informs and contextualizes the study. I pay particular attention to critical social theory as applied in education and review education policy implementation literature. Keeping in mind the external influences on the school environment, I review structural adjustment programs (SAPs) and how they have influenced Zambian education outcomes. Drawing on postcolonial perspectives, I consider how these programs have evolved and examine their continuing influence in how countries such as Zambia organize and administer their education sectors. With sport and play increasingly becoming key components in addressing social development challenges, and in the case of Zambia traditional games being pivotal to physical education instruction, I also review literature on traditional games.

Chapter 3 focuses on the methodology and methods adopted for this study. As mentioned earlier, for this study I primarily employed document and policy analysis and conducted interviews, with observations from my participation in physical education workshops helping contextualize the research context. In this chapter I highlight my role as a researcher and draw on the literature on reflexivity in an attempt to come ‘out’ in response to Finlay’s (2002) dare to qualitative researchers to make their presence explicit within the research process, particularly as it relates to the researcher’s influence on the methods and types of data gathered. As part of this outing, I also review the politics of representation as they relate to an indigenous researcher returning to his home country, and in the process I highlight my role as a bearer of transnational power and how this influences the dynamics between researcher and research participant. Drawing on the concept of reflexivity, I emphasize several 'cultural moments' before and following the 2006 Presidential Decree (particularly at workshops) to illustrate how the methodology and methods for the study were selected and informed by these moments and experiences.

Chapter 4 is the first of the thesis results chapters and discusses the development, promulgation and understanding of the goals of the Presidential Decree. All the research participants were able to provide rich and insightful responses on how they learnt of the 2006 decree, which in turn provides a cogent picture of the Ministry of Education’s policy development and promulgation process. How research participants came to learn
of the decree highlights the level of commitment to it and, by extension, the priority placed on subjects such as physical education in the Ministry of Education’s HIV/AIDS policy goals. Significantly, participants offered what they understood the goals of the decree to be, which at times contradicted the stated objectives both of the decree and of HIV prevention in general. With a history of involvement in the Zambian physical education community, particularly in the run-up to the announcement of the decree in 2006, I could relate much more to this research outcome than others with the use of my reflexivity-augmenting participant responses.

In chapter 5 I attempt to illustrate how physical education and games are being utilized as a medium for HIV/AIDS prevention and in addressing gender inequality in the Zambian state school sector. The responses offered by participants point to institutional weaknesses and contradictions in the support supposedly available to teachers. The responses offered by research participants demonstrate how teachers are reacting to these challenges in creative and innovative ways by drawing on informal networks of peers and non-governmental organizations. Notably, this conundrum has raised the profile and role of traditional Zambian games and of NGOs within the physical education curriculum, as teachers seek more diverse and creative ways of engaging students on the issues of HIV/AIDS. Further, the responses provided by participants provide a glimpse of the current quality of education in Zambian schools. As noted earlier, education quality is set to be the next priority for countries such as Zambia which are likely to attain the 2015 MDG on education.

In chapter 6 I build on the findings from the previous chapters and look at the training and administration of physical education teachers within Zambian state education. This chapter shifts the emphasis away from teachers and begins an interrogation of the education bureaucracy, in the process highlighting the critical roles of certain administrators in the education hierarchy. The chapter also explores what knowledge is imparted to those charged with communicating and informing Zambian students about HIV/AIDS. The responses of participants to the question on what training they have received for addressing HIV/AIDS through physical education is telling in the sense that the Ministry of Education’s rhetoric concerning its commitment to overcoming the challenges of HIV/AIDS does not reflect the realities of physical education teachers
in schools. The responses offered by participants and the findings in this chapter therefore constitute critical elements in the process of holding the Ministry of Education and the Zambian government accountable for their policy commitments on HIV/AIDS.

Chapter 7 reveals how the Presidential Decree has been an enabler of teacher voices and is fostering a shift in gender relations within the classroom. Research participants spoke of feelings of empowerment as a result of the decree, as its subject was often ridiculed by fellow staff members in the school and perceived as an inferior subject by most parents. These feelings of empowerment have led schools to be sites of cultural transformation as students and teachers challenge and disrupt dominant ideologies about gender roles. These feelings, combined with the administrative authority of the Presidential Decree, have resulted in teachers becoming proactive in demanding resources for physical education. The sense of empowerment also extends to students, who now demand to be taught physical education and cite the decree when doing so. Both teachers’ and students’ responses are significant when one considers how power is exercised within education and how ‘confronting’ senior officials in Zambia is frowned upon.

In chapter 8 I summarize my findings, noting key research outcomes that point to several contradictions within the education bureaucracy and inform the sport for development movement with regards to addressing HIV/AIDS in public education. I attempt to answer the question of whether the decree has been successful in delivering on its stated goals and explore the research findings in relation to the research objectives. To answer the question on whether the decree has been a success, I reflect on some of the notable challenges and successes outlined by participants with regards to the decree, as well as on the implications for education policy development, implementation and promulgation. Specific to policy development and implementation, I ask to what extent the observed outcomes were intended or not and draw on key education policy implementation literature (McLaughlin, 1987; Oakes, 1989). The outcomes of the study, when considered alongside literature on policy implementation within Zambian education, leave one hopeful that the decree will achieve its stated goals, even if the research provides mixed and often contradictory results. While the initial results do not provide a comprehensive argument for the success of the policy’s implementation, they do highlight several smaller successes that need to be acknowledged and celebrated, as they form the foundations for future policies. I conclude the chapter by providing recommendations for
reinforcing the initial successes of the decree and by addressing identified challenges of implementation. I also provide recommendations for future research.
Chapter Two:

Background and Review of Literature

2.1 Introduction

The review of literature covers seven themes that help contextualize and inform the adopted research approach of this study. I begin the literature review with an exploration of critical theory, specifically its application in education and in postcolonial perspectives. The initial focus on critical theory is deliberate, as I adopt critical perspectives in the subsequent review of Zambian education, structural adjustment programs (SAPs), traditional games, sport for development, and education policy and program implementation literature. I provide a brief overview of postcolonial literature, which illuminates the literature on the Zambian education sector, and in particular of the notion of ‘colonial residue’, which is evident in the education sector’s organization and in the foundation of Zambian physical education in ‘muscular’ Christianity.

Within the literature review I broadly outline Zambian education, its development, key policy milestones and how structural adjustment programs have influenced the delivery of education in Zambia. It is useful to understand the structure of the education system, as it has considerable bearing on how policies and mandates are ultimately understood and implemented by key actors in the system, such as teachers and education administrators. While the literature specifically on Zambian physical education’s development is limited, the review of Zambian education is useful to provide an informed analysis of how physical education in particular has been impacted. In this context, I also review literature on traditional games, which is pertinent because Zambian games have become prominent in the country’s delivery of physical education. They should also be considered in the wider social context of a revitalization of games and an increased pride in traditional Zambian culture, something that has occurred particularly in the past five years. The use of traditional games for social development, though not new, also forms part of the growing sport for development movement. Finally, as the study explores the use of a government decree, I explore education policy literature to better understand the conditions under which a policy may be successfully implemented and to explore issues that require foregrounding in the analysis. To this literature I also add my experience of sport for development programming and what these experiences have led
me to consider (the politics of representation, the optics of implementation, the role of donors and the size of the physical education community).

2.2 Critical Theory

Critical theory focuses on political, cultural, economic and social relationships within a culture, particularly as they relate to which groups have power and which do not (Chen, 2012). Critical perspectives are particularly useful for analyzing the structure of the Zambian education sector and the current state of physical education, the latter of which has, as a non-examinable subject until 2009, received low priority with regards to the allocation of resources (human, financial political) and space on the school timetable. Additionally, critical perspectives are useful for analyzing how the development and organization of Zambian education has served to reinforce the superiority of certain groups (boys and men) relative to others (girls and women).

Critical theory is concerned with empowering human beings to transcend the constraints placed on them by race, class and gender (Fay, 1987). It focuses on three levels of self-imposed or externally imposed influences of oppression: individual, group and society (Peca, 2000). Emancipation on all three levels depends on engagement in a critique of the individual, situational (socioeconomic) and historical forces that have caused the oppression. Critical theorists seek to produce pragmatic knowledge, a cultural and structural bricolage, judged by its degree of historical situatedness and its ability to produce praxis, or action (Denzin and Lincoln, 2005, p.187). The goal of critical theory, according to Pokewitz (1984), is to change the world, not to describe it (Peca, 2000, p.5). To engage in a dialectical process (discussion and reasoning by dialogue) causes an increased awareness of reality, thus leading to change.

Applied to education, “critical social and educational inquiry integrates theory and practice in a way that not only makes transparent to people the contradictions and distortions of their social and educational lives, but also inspires them to empower and emancipate themselves” (Smith, 1993, p.92). Remarking on why critical evaluation in education is necessary, Waters (1998) argues that to better comprehend public education, the sociocultural, political and hierarchical relationships that transpire within the school,

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5 Bruscia (1998) defines situatedness as the “ability of the researcher to situate the participants and himself or herself in their own respective worlds, both past and present, as well as in the shared and immediate lived world of the research study itself” (p.186).
as well as within the community, must be linked to the broader political and economic issues of society at large (Ogbu and Matute-Bianchi, in press).

My experience of formal education in Zambia as a student and, in particular, my recent professional work with educational institutions in Zambia have drawn me to Freire (1972) and his critique of the ‘banking’ relationship in education and his concept of ‘conscientization’. Freire (1972) believed that formal education ultimately becomes an act of depositing, an act in which students are depositories and the teacher the depositor. According to Freire (1972), the banking relationship acts as a pillar to maintain an oppressive social order: the more students put their efforts into receiving and storing the information deposited in them, the less they can attain the critical consciousness that comes from intervening in reality as makers and transformers of the world (in Blackburn, 2000, p.4). Conscientization is understood as the process by which humans become more aware of the sources of their oppression (Blackburn, 2000, p.7) and develop their capacity for critical thinking. Individuals may not have the intellectual confidence to reflect upon the world and formulate their own agenda. They may be unaware that the poverty they suffer is not permanent but results from the operation of unjust structures in society (Blackburn, 2000). For conscientization to achieve its aims, it has to be accompanied by action and reflection. The concepts of conscientization and critical awareness are particularly useful in the Zambian HIV context, as they enable learners not only to be aware of the oppressive social forces that can exacerbate their vulnerability to infection but also to become empowered and equipped individuals who can take action and change their circumstances.

Reflecting on Freire’s influence on international development workers, Blackburn (2000) asserts that Freire’s approach poses a challenge. Not only does it demand that they work with the poor to challenge established norms, behaviours and institutions in society but it also constitutes a challenge to those “oppressive” characteristics within themselves (p.4). Those who adopt a Freirean philosophy leave themselves open to critique for imposing a particular worldview on others, such as suggesting an oppressed and powerless people. Communities and individuals may exert their agency or exercise power in discrete ways that may not be readily apparent. This can occur in the form of non-cooperation and the secret observance of a distinct culture and identity (Blackburn,
2000). Blackburn (2000) adds that those educated in the banking mode of formal
education may find it difficult to practice dialogical education as advocated by Freire
(1972). According to Blackburn (2000), Freire’s (1972) educational philosophy requires
the rejection of those built-in banking education reflexes that all educated people suffer
from in the presence of the uneducated. It also demands a willingness to effectively
disempower oneself to provide the empowerment space that the oppressed require (p.13).

Indigenous scholars (Bishop, 1994; Smith, 1999) have pointed out that critical
theory has failed to address how indigenous cultures and their epistemologies have acted
as sites of resistance empowerment. As a consequence, these scholars advocate for a
localized critical theory. The local is grounded in the politics, circumstances and
socioeconomics of a particular time and place, as well as in a particular set of problems,
struggles and desires (Denzin et al., 2008). To this I would add that it is particularly
important for feelings of empowerment and their outward display to be nuanced, so that
they do not place individuals in danger of physical violence. For example, high school
students in the town of Ndola reported domestic violence as a common but often
unreported practice (Bajaj, 2009). One needs to consider these issues in the formative
stages of seeking transformative change, such as in the use of critical approaches in
hierarchical and patriarchic societies: in these cases, those holding power are likely to
perceive critical approaches as an affront challenging their authority.

Smith (2000) suggests that indigenous scholars should ask themselves the following
key questions about any research project:

1. What research do we want done?
2. Who is it for?
3. What difference will it make?
4. How do we want the research done?
5. How will we know it is worthwhile?
6. Who will own the research?
7. Who will benefit? (p.239, in Denzin et al., 2008, p.9)

These questions serve to interpret critical theory through a moral lens, through key
indigenous principles. It should be noted that these questions are addressed to indigenous
and nonindigenous researchers alike. As an indigenous researcher, my attempt to answer
these questions begins with an understanding of the environment in which I conducted my study (Zambian education), the external and internal structures that may influence this environment (international development and structural adjustment programs) and how some indigenous cultural practices can contribute to alleviating some of the challenges faced in the community (traditional games). Smith (1999) reminds indigenous or “insider” researchers that the research we conduct must be humble, because the researcher is a community member with various roles, relationships, statuses and positions to consider (p.139).

2.3. Postcolonial Theory and Gender

Social scientists have long debated postcolonial theory, and the name remains highly contested. Much of this debate questions whether colonialism and its effects can be consigned to the past, suggesting that countries, communities and individuals no longer experience colonialism. In its hyphenated form, the term ‘post-colonial’ functions as a temporary marker, implying linearity and chronology (Denzin, 2005). Rather than signaling an epochal shift from colonialism to after-colonialism, postcolonialism refers to ways of criticizing the material and discursive legacies of colonialism (Radcliffe, 1999, p.84). Postcolonialism implies a constant, complex, intertwined back-and-forth relationship between the past and the present. In this sense there is no ‘postcolonial’, there are only endless variations on neocolonial formations (Soto, 2004, p.ix, in Denzin, 2005, p.953).

From a theoretical standpoint, postcolonial perspectives are influenced by Marxism (political economy) and poststructuralism (cultural and linguistic analyses) (McEwan, 2001). Hall (1996) suggests that these postcolonial perspectives focus on the impact of colonial practices on the construction and representation of identities, the relationship between power and global capital and the significance of race, gender and class for understanding domination and resistance. So what does adopting a postcolonial perspective mean for conducting research in Zambian schools? To answer this question, I refer to Giroux (1992), who suggests:

The challenge presented by Paulo Freire and other postcolonial critics offers new theoretical possibilities to address the authority and discourses of those practices wedded to the legacy of a colonialism that either directly constructs or is
implicated in social relations that keep privilege and oppression alive as active constituting forces of daily life within the centers and margins of power. (p.6)

An immediate challenge I foresee is making the connection between colonialism and its legacies, on the one hand, and present-day oppressive social and material relations that privilege certain groups and individuals, on the other. My experience in social interactions with Zambians has led me to believe that most of them will tend to overlook pre-independence events that have been influential in the development and organization of civic life. Additionally, while individuals may acknowledge the effects of new forms of colonial domination such as structural adjustment programs, most people view these as separate from colonialism. Critical awareness and conscientization can be helpful in this regard, as they encourage people to question the circumstances of their everyday lives and why it is that certain groups are privileged over others. For example, in Zambia whiteness is associated with wealth, power and influence. This is similar to Kingsbury and Klak’s (2005) observations in the Caribbean, where whiteness or being a Caucasian are still associated with wealth, power, competence and authority, usually making this attribute a key ingredient to gaining access to the geographic spaces most closely connected to the accumulation of international capital and political power (in Mullings, 2005, p.276). In addition, speaking traditional Zambian languages within schools has tended to be frowned upon, with the word ‘vernacular’ often used to describe them. Speaking local languages is also associated with incivility and filth. What has led people to react in such ways towards whiteness or local languages? Drawing on Fanon’s (1967) *Wretched of the Earth*, Mullings (2005) provides a useful account of the privileging of race within colonialism:

For Fanon (1967), the colonial project was one that racialized the unequal economic and political relationship between the colonizer and the colonized through the creation of rules, norms, regulations and rituals that did not jeopardize the accumulation of wealth by colonizers. Any encounter between whites and non-whites or foreigners and locals in this context could only be understood within the binary of the ‘colonizer/colonized, powerful/powerless, white/black, rich/poor’. These binaries, Fanon (1967) argued, were particularly powerful
because they simultaneously constituted the economic substructure and superstructure of the colonies…. Thus he argued that the case often became the consequence, “you are rich because you are white, you are white because you are rich” (Fanon, 1967), that ultimately structured the course of all encounters between those constructed as powerful (white/rich/colonizer) and those constructed as powerless (non-white/poor/colonized). Fanon’s (1967) belief that “race becomes the lens through which all social relations and theories of time are judged” suggests that all encounters between whites and non-whites are mediated through the tension created by the poor material status and political status of the ruled relative to the rulers. (p.274; italics added)

Thus I argue that that some of the legacies of colonialism in Zambia are rules, regulations and rituals governing schools’ organization and administration. From a policy perspective it is important to note that “colonial practices that were entrenched in unprogressive and restricted educational policy under the colonial administration,” such that Zambia had 100 African university graduates and 1,000 secondary school graduates at independence (Coombe 1967), were removed soon after independence (Banda, 2010, p.238). These changes occurred mainly through the so-called Zambianization policy, which sought to place black Zambians in senior management and prominent positions. It is my contention, however, that Zambianization, while increasing the number of Zambians in senior positions, resulted in the reproduction of some colonial practices (e.g., the privileging of English and an inferior regard for indigenous culture) by those Zambians appointed to senior management. Zambia’s national motto of “One Zambia, One Nation” has been championed in some sectors as the reason for privileging the English language to build national unity, rather than favouring a particular Zambian language among the country’s more than 70 tribes and dialects. Additionally, the construction and privileging of whiteness as wealthy, powerful and of superior knowledge continues to this day, undermining those negotiating and addressing new forms of colonialism because they already begin from a point of supposed inferiority and limited power. Yet the world and our understanding of it has changed since the days of colonialism, and it is important not to essentialize race and focus entirely on the binaries of colour alone: power, class and gender are equally significant and deserving of
attention.

Reflecting on the legacies of colonialism and the influence of Christian missionaries in the colonial project, one can make the case that the dominant gender relations of the colonial era have been continually reproduced, such that males are still privileged over females within Zambian society. Zambia’s traditional patriarchal society subjugated women prior to the arrival of missionaries, and this social and cultural domination has been maintained since. Patriarchy and colonialism are as such similar in their oppression of women and the colonized and in the privileging of males (white and indigenous). Today this privileging is manifest in how sport and physical education within Zambian schools is taught, particularly as the pre-independence period between 1936 and 1964 was “characterised by inequalities based on race, class and gender in the provision of sport and recreational activities by the colonial government and … foreign-owned mining companies” (Banda 2010, p.238). This, combined with a patriarchal Zambia culture, led me to expect an overall outlook on gender that is defined along difference or opposition from the dominant gender, specifically concerning attributes associated with a particular sex, such as strength and athleticism for males and weakness and a nurturing quality for women.

2.4 Zambian Education

Zambia inherited an undeveloped and racially segregated educational system that was regarded as irrelevant to Zambia’s needs (Nieuwenhuis, 1996). At independence in 1964, Zambia had one of the most poorly developed educational systems of Britain's former colonies, with less than 0.5% of the population estimated to have completed primary education (Mutangadura, 2009). The country has since invested heavily in education at all levels, and now well more than 90% of children ages 7 to 13 attend school (Mutangadura, 2009).

Zambia’s formal educational system is said have a “9-3-4+ structure”: nine years of basic school, three years of high school, and four years or more of university education (Ministry of Education, 2005). Historically, primary and secondary education was offered in separate institutions, but this changed with the development of basic schools, which provide the first nine years of schooling (Ministry of Education, 2005).

In its development, in the 1960s and 1970s, educational planning focused on the
expansion of primary and secondary schooling. During the 1980s, the focus was on vocational education and training (Nieuwenhuis, 1996). In the 1990s, with the adoption of Education for All, the government committed to universal primary education. Government expenditures on education remained at roughly 10% of the total national budget and 2% of the GDP. Both were below the targeted levels, 15% of total government expenditures and 4% of the GDP (Mutangadura, 2009). More recently, the benefits of reintroducing free basic education in 2002 have begun to bear fruit as Zambia is targeted to meet its policy commitment of universal primary education (De Kemp et al., 2008; DfID, 2011; JCTR, 2011). Student enrollment has increased from 2.5 million students in 2005 to 3.3 million in 2009, with the Gender Parity Index (GPI) improving from 0.95% to 0.99%. Teacher training programs have increased the teacher supply to match the expansion of school enrollment. The number of teachers increased from 50,123 (27,559 males and 22,564 females) in 2002 to 77,362 (39,733 males and 37,629 females) in 2009; and funding to the education sector increased from 2.9% to 3.5% of the GDP between 2006 and 2010, resulting in the improvement of school infrastructure, including water and sanitation (DfID, 2011). Even with these notable achievements, there is still a gender gap in education, particularly in rural areas, and an overall gap between enrollments in urban and rural areas. Although there is both a recognized need and a high demand for increased activity in basic education, the government has conventionally prioritized higher-level education in its allocation of resources. Funding to basic education needs to match the designated target of 4% of the total GDP and possibly more. From a policy perspective, since independence Zambia has produced three major educational policy documents: the Educational Reform (1977), Focus on Learning (1992), and Educating Our Future (1996). The language used in these policy documents around the policies’ aims can be argued to fit with Freire’s (1972) philosophy on education and the development of critical consciousness. All the policies seek to develop the individual and to enable everyone to navigate the demands of everyday Zambian life, particularly poverty. For example, the Educational Reform was partly a response to Zambian education commentators who had criticized the education system as too

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6 The Education for All movement is a global commitment to provide quality basic education for all children, youth, and adults. The movement was launched at the World Conference on Education for All.
academic, examination oriented and not practical enough to meet the country’s challenges and aspirations. Focus on Learning viewed education as an instrument to “foster the fullest possible development of each individual for his or her personal fulfillment and as a significant member of the Zambia community” (Focus on Learning, 1992). It emphasized the provision of a compulsory quality seven-year education (primary school). While the earlier Educational Reform was broad in its coverage of the educational system, Focus on Learning had a more narrower approach. It focused on primary-school education, stating that the completion of the seventh grade would help alleviate ignorance and poverty and simultaneously promote economic and social development (MOE, 2009). Educating Our Future was based on the principles of liberalization, decentralization, equality, equity, partnership and accountability (MOE, 2009). It aimed to “serve individual, social, and economic well-being and to enhance the quality of life for all” (MOE, 2009).

Molefe and colleagues (2011) chart Zambia’s path in reforming the education sector and identify decentralization as a key component. Decentralization produced 72 District Education Boards (DEBs) in a formerly highly centralized system. Decentralization is believed to lead to improvements in teacher recruitment and deployment practices, as well as to greater motivation and better overall performance among teachers. Molefe and colleagues (2011) note that many DEBs initially lacked capacity, so that some of their functions had to be re-centralized, but over time capacity at the local level has grown. Bennell’s (2004) study of teacher motivation and incentives in sub-Saharan Africa and Asia finds “a paucity of evidence that can be drawn upon to assess these assertions in a robust manner” (p.viii). Yet Bennell (2004) makes an important observation by noting that decentralization can exacerbate political interference and points to weak teacher supervision and management styles that are authoritarian with limited participation, delegation and communication with respect to major school management functions (p.10). Reflecting on this and my experiences and encounters with education administrators in Zambia led me to expect a concentration of power and decision making in senior administrators within schools and departments.

A number of other policies are worth mentioning as they highlight priorities of the Ministry of Education and how they fit into Zambia’s overall development objectives.
Launched in 1999, the Zambian Basic Education Sub-sector Investment Programme (BESSIP) was Zambia’s first comprehensive program meant to implement the 1996 national policy on basic education. In light of achievements made under the BESSIP, the Ministry of Education produced a strategic plan conceptualized around four overarching themes: access and participation; quality and relevance; management, administration and accounting; and HIV/AIDS (MOE, 2005). The Fifth National Development Plan (FNDP), informed by the strategic plan, was in effect from 2006 to 2010. Recently Zambia launched the Sixth National Development Plan for the period 2011 to 2015.

2.5 Structural Adjustment Programs in Zambia

Beginning in the late 1970s, as a result of the economic crises faced by many developing countries in the wake of rising oil prices and falling commodity prices, structural adjustment programs (SAPs) were introduced to encourage governments to pay back debts and to restructure their economies (Slusser, 2006). SAPs are implemented as ‘conditionalities’ for loans given by monetary lenders including the World Bank. Lenders require that governments take steps intended to increase their GDP. Governments must focus on increasing exports, decreasing spending on social programs and privatizing public services such as water and electricity (Slusser, 2006).

SAPs have generated substantial debate regarding their merits and effectiveness. They are largely driven by Western donors, with little or no input from developing countries. Many players in the development arena have argued that the neoliberal underpinnings of SAPs and their prioritization of debt repayment over government spending on services has, in fact, led to greater poverty (Rapley, 1996; Slater, 2004). In recent years, researchers have argued that SAPs have produced less than impressive results (Muuka, 1997) and have transformed into other debt conditionalities, rather than making them disappear (Lewis, 2005; Shah, 2008). It is my contention that while SAPs have not addressed poverty, the inability of recipient countries to work together and negotiate as a block of recipient countries contributed to the inadequacy of SAPs. With government’s looking out for their individual interests, Western donors always had considerably more power over the direction and focus of SAPs. At the same time, how countries implemented or failed to implement donor funds in certain countries (and sectors) should not be overlooked.
SAPs are pertinent to this study because Zambia had to implement them in response to the sharp decline in world copper prices in 1974 and to the subsequent unfavourable change in Zambia’s terms of trade. International agencies and bilateral donors argued that Zambia had to implement SAPs to address structural bottlenecks and to move the economy towards a market-oriented one, with the ultimate aim of a more efficient allocation of resources (Mwanza et al., 1992). Among the most important conditionalities imposed on Zambia are prioritized debt repayment (decreasing spending on social programs such as education and health) and public-sector restructuring (leading to either hiring freezes or redundancies in the civil service). Zambia adopted a systematic SAP in 1983 (Saasa, 1996; Simutanyi, 1996). The period 1983–91 was characterized as a so-called stop-go due to the government’s interruption of the SAP in 1987 and its reintroduction in 1989 in an effort to quell political discontent (Saasa, 1996). A major point of contention between the government, the IMF, and the general population in Zambia was the subsidy allocated to the main staple food (maize meal), which had to be eliminated or reduced if Zambia was to meet the SAP conditions (Saasa, 1996). This led to mass riots and in the process placed the government between the IMF and the people. After 1991, the newly elected Movement for Multiparty Democracy (MMD) government accelerated SAPs. A major focus during this period was the introduction of market reforms within education and a hiring freeze on teachers. Historically, the introduction and implementation of SAPs marked the turning point of Zambia’s economic and social misfortunes. The government could not deliver social services (I-PRSP, 2000). Reflecting on Zambia’s experience with SAPs, Loxley (1990) argues that the country’s economic structure made short-term gains from adjustment impossible. Loxley (1990) also contends that it led to the abandonment of SAPs in favour of a government program that itself failed to fully address the nature of Zambia's economic crisis. Mwanza and colleagues (1992) note that SAP implementation appeared to be contradictory. They argue that policies were not mutually sustainable, citing, among many other examples, prompt debt servicing at the expense of retaining much-needed foreign exchange. They conclude that “the IMF conditionality was wrong, wrongly timed and wrongly effected…. the main outcome of the conditionality was to make the country pay its debt to the IMF/IBRD” (p.44).
In 1999, the IMF replaced SAPs with Poverty Reduction Growth Facility (PRGF) and Policy Framework Papers with Poverty Reduction Strategy Papers (PRSP) as the new preconditions for loan and debt relief (Shah, 2008). Updated every three years with annual progress reports, PRSPs describe the country’s macroeconomic, structural and social policies and programs. The PRSPs aim to promote broad-based growth, reduce poverty and address associated external financing needs (IMF, 2009). Like SAPs, PRSPs have also been controversial. Researchers and analysts have criticized them for using the language of poverty reduction while still maintaining the pro-market policies of SAPs, calling them simply repackaged SAPs (Shah, 2008). ActionAid, an international development organization, commenting on the impact of IMF policies on education, contends that “they limit what countries can spend on education in many ways, either directly, through limits to teacher wage bills, or indirectly, by imposing tight limits on overall spending or setting inflation targets that make spending increases impossible” (2005).

Zambia was granted provisional debt relief under the enhanced Initiative for Highly Indebted Poor Countries (HIPC) when it reached its ‘completion point’ in 2000 (Goldsbrough and Cheelo, 2007). Reaching the full HIPC completion point was delayed several times by problems implementing various conditions set for the debt relief, including when programs supported and monitored by the IMF went off track in 2003 (Goldsbrough and Cheelo, 2007). As a consequence, the IMF froze lending to Zambia and delayed debt relief until after the implementation of an increase in teacher remuneration and the introduction of a housing allowance for civil servants. This and other salary raises increased the wage bill to 9% and pushed the budget deficit to 1% higher than agreed with the IMF (ActionAid, 2005, p.22). It should be noted that the IMF has responded to these critiques by emphasizing that surges in the wage bill threatened macroeconomic stability and that the overall ceiling did not prevent the government from hiring new staff in priority areas (Goldsbrough and Cheelo, 2007, p.20).

Zambia did reach the completion point in April 2005 and was eventually granted further debt relief from the IMF and from multilateral development banks in early 2006 under the Multilateral Debt Relief Initiative (MDRI). As a result, the face value of Zambia’s external debt was reduced from more than $7 billion in 2004 to about $500
million by mid-2006 (Goldsbrough and Cheelo, 2007).

The key ‘take-home’ message with respect to education, SAPs, the IMF and such organizations’ continued influence on national governments, as the Global Campaign for Education (2009) notes, is that IMF growth forecasts focus on a 3-to-5-year periods and fail to include any longer-term growth returns. This leads to a systemic underrepresentation of the economic benefits of educational investment, which come over an 8-to-15-year period—just when children who leave school enter the workforce (p.6). This keeps many countries in sub-Saharan Africa from following the educational expansion that worked so well for the Southeast Asian economies in recent decades (p.10). Additionally, stringent conditionality imposed by such organizations, such as caps on budget deficits with limited flexibility, are likely to have a detrimental effect on education, particularly if one considers the already scarce resources for this sector. The education sector is likely to lose out to other sectors in the country when challenges appear and the need for action may be more immediate there, such as concerning national security and the ongoing human resources crisis in the health sector. With HIV preventive education, the benefits of children becoming critically aware of their circumstances and being able to avoid infection certainly go beyond economic and investment forecasts. There is a human element to equipping children with the knowledge to address HIV/AIDS, particularly as social structures continue to crumble in light of the epidemic.

More recently, China’s emergence as an alternative to Western donors and multinational agencies such as the IMF and the World Bank has caused considerable debate within the field of international development. China’s rapidly growing economy and large population have resulted in an unprecedented demand for resources and raw materials from countries in Africa and South America. The debate has centered on China’s prioritizing of economic interests over human rights and its willingness to trade with so-called rogue states such as North Korea. Critics accuse China of using its aid to gain access to natural resources. Further, the obscure nature of China’s aid grants leads critics to argue that Chinese aid undermines Western donors’ efforts to promote democracy, human rights and the rule of law.

Dreher and Fuchs (2012) reviewed data on China’s aid allocations between 1996
and 2005 and conclude:

There is no evidence that China's allocation of aid is inferior from a humanitarian point of view when compared to other donor countries. When it comes to democracy and indicators of governance, there is also little evidence that China's allocation of aid is inferior. Although China does not take institutional quality into account when deciding on its allocation of aid, the same holds for most other donors in our sample. In particular, we did not find that China's aid is biased towards autocratic or corrupt regimes as claimed by its critics.

Based on our analysis of China's aid allocation decisions, it seems that fears that Chinese aid undermines the efforts of other donors to promote democracy and good governance are exaggerated. The same holds for commercial motives. While commercial interests matter, our empirical evidence does not support the idea that China puts greater weight on giving aid to either countries with strong commercial ties, or to countries that are more abundant in natural resources, in comparison to other donors. (p.4)

For many poor countries like Zambia, China’s interest in mineral extraction and raw materials, and its willingness to commit to long-term trade agreements, is a welcome alternative to the bureaucratic demands of dealing with the IMF in exchange for relatively minimal debt relief and loans. China presents an immediate solution to the challenges of poor infrastructure and unemployment. With its abundant copper deposits, Zambia has become a trading partner for China, supplying the copper needed for electric and telephone cables in exchange for investments in infrastructure and mining. These greater ties also involve aid and loans or credit. Mukanga (2012) reports that Zambia has recently acquired $1 billion in credit for projects in hydro power and road infrastructure; credit for building stadiums ($100 million), for buying rail wagons and for funding new regional electricity interconnections from Zambia ($225 million). Further, military cooperation has intensified with plans to purchase helicopters and police and military equipment. Recently the Zambian government purchased eight K-8P jets for the Zambian Air Force (ZAF) to “enhance the military wing’s ability to monitor the stability of the country”, according to the ZAF commander Eric Chimese (Mukanga, 2012, p.3). While
one cannot deny the need for greater infrastructure development and associated job creation, it is concerning that after recently having its debt cancelled, Zambia is accumulating more debt while investment in social services such as education remain a low priority. Does Zambia really need to be purchasing jets given the state of the Zambian civil service, the country’s hospitals and its schools? Perhaps an implication of the emergence of China as a donor is priority given to infrastructure at the expense of investments in social services. From a postcolonial perspective, Mukanga’s (2012) essay “China’s New Colonialism” provides a prescient observation and a fitting conclusion on the broad implications of China’s influence:

Colonialism is of course also intellectual. At the heart of the Chinese story in Africa is not only an escalation of African subjudication but also the spread of ideas. One such idea is the perpetuation of a slavery ethos. Africa's current leadership continues to enslave their people, repeating the same mistakes of their pre-colonial forefathers. The buyers may have changed but the sellers remain the same—a small band of power hungry elites. The commodities were ivory but now its copper, manganese, diamonds, etc. One thing never changes—people are still being sold. Africans are not being physically shipped, but certainly many have all their dignity stripped through poverty and other abuses. (p.3)

As Mukanga (2012) points out, there is a danger of repeating previous mistakes, and specific to this study, the danger amounts to relegating the needs of the public to the backseat and thus failing to invest in social sectors such as education. One could argue that underinvestment in education enslaves societies to poverty and thus increases their vulnerability to issues such as HIV/AIDS.

2.6 Traditional Games Revival
Since the late 1980s, many festivals, gatherings and symposiums have been organized on the topic of traditional games, fostering their revival and a new awareness of the critical role they play in many cultures (Jaouen, 2002). Grant (2003) notes that it is always exciting and sometimes a little confusing to live through a revival of any kind, when something long forgotten rises from oblivion and gains a fresh and potent currency in the present, or when something like traditional games and sports, marginalized from
mainstream funding, suddenly becomes important in terms of its cultural capital. In Zambia, where life expectancy has fallen to below 50 years (UNDP, 2008), such cultural capital and its transmission to the next generation take on an even greater meaning. The revival of traditional games in Zambia has to be understood in the wider context of increased national pride as evidenced by the rising popularity of traditional ceremonies such as weddings, individuals ‘reclaiming’ their traditional names\(^7\) and the popularity of lunch spots known as ‘Amatebeto’.\(^8\)

The revival is occurring after a period of what Giulianotti (2004) has called cultural genocide during the colonial era, which privileged the sports introduced by colonial rulers and suppressed traditional Zambian games. Giulianotti (2004) highlights sport’s historical contribution to the colonial subjugation of non-Western cultures: sporting institutions were constituent parts of the colonial military. Specifically, cultural genocide occurred in the deliberate supplanting of non-Western body cultures by imperial games. In British colonies, for example, sports were utilized particularly by Christian missionaries to crush indigenous cultural identities and practices to create “a universal Tom Brown: loyal, brave, truthful, a gentleman and, if at all possible, a Christian” (Giulianotti, 2004, p.358). It is no wonder that the country’s official sport is football (soccer) and that the country fields national teams in athletics, basketball, cricket, netball, tennis and rugby. Significantly, football is viewed by most Zambians as a Zambian sport, and they do not associate the sport’s introduction with the administration of the mining industries in Zambia’s Copperbelt Province in the 1920s. The larger community has thus welcomed the revival of traditional games more to strengthen the country’s cultural

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\(^7\) It is common in Zambia for individuals to have both a Christian name (e.g., John, Paul) and a traditional Zambian name (Chanda, Mwansa). Often people will be referred to by their Christian name.

\(^8\) Amatebeto is a gesture of the consolidation of the union of marriage shown by the bride's side just before the wedding. It symbolizes the welcoming of the groom to the bride’s family. After the bride and groom are taken through rituals similar to marriage guidance counseling, the Matebeto ceremony is held. The Matebeto is held to show the groom's family what foods he can expect to find at home. Relatives of the bride will be invited to contribute various types of food and will also participate in the cooking the night before. In the morning and at an agreed time, the bridal entourage will carry the food to the groom's parent's house accompanied by singers and drummers, with the songs conveying particular messages. Restaurants and lunch spots that specialize in a wide range of Zambian foods similar to those found in Amatebeto have mushroomed throughout the country. But until recently, a business lunch, for example, would consist of entrees such as rice or pasta.
capital and to ensure that this knowledge is passed on to the next generation.

Traditional games are games that have been passed on from generation to generation in a particular society or ethnic group (SIA, 2004, p.15). Traditional sports and games tend to be confined to a limited geographic area, are often referred to as national or local, are often regarded as symbols of ethnic or regional identity and are also called “folk games” (Renson et al., 1997, p.57). Goslin and Goslin (2002), however, find that traditional games labeled as indigenous to South Africa have similar counterparts in other global areas. In Zambia the games include hide-and-seek, ball games and singing and dancing. Many of these traditional games—for example, tales and riddles that require recall, memorization, sequencing and logical thinking—promote cognitive development and intellectual capacity (Dambele and Poulton, 1993, in Lowden, 2000. p.8).

The revival of traditional games is not without controversy or debate. For instance, some researchers question the merits of the games in the present day or whether it is worth preserving them at all. Whitson (1983) discusses pressures on regional games in dominant cultures, highlighting the impact of modernization and the dynamics of cultural and economic domination. Goslin and Goslin (2002) look at traditional games in the Tshwane area of South Africa, noting that these have been recognized as a significant part of the nation’s cultural heritage. They caution that with modernization, nations tend to lose some of their indigenous cultural heritage. Central to these discussions is the authenticity of the ‘culture’ being revived, One major argument claims that culture is organic and that attempts to revive the games therefore can render it artificial (Whitson drawing on Cameron, 1979). This leads Whitson (1983) to conclude that cultural domination and dependence can indeed occur when homegrown cultural forms (traditional regional music, games, etc.) are seen by local people as less attractive than cultural forms originating elsewhere (p.147). Renson and colleagues (1997) look at the social profile of participants in 30 different traditional games in Belgium, concluding that stereotypes of participants are confirmed (elderly, lower-class males) and that folk games have, because of the participants’ low social status, little or no chance of becoming cultural trendsetters or sport fashion models (p.66).

While I did not necessarily perceive the exclusion of traditional games from the physical education classes as cultural domination at the time of my own school
attendance, I now recognize that it was. Schools promoted Eurocentric sports and frowned upon the use of traditional games, considering them a distraction from the school’s education goals. By the time of secondary school attendance, the idea of traditional games had become highly unattractive (and not cool!), even though we had played these games almost every day at home during the early years of primary school.

Egan (2003) examines Inuit and Cree Indian games of Canada using Maslow’s hierarchy of needs and Gardner's multiple intelligences and concludes that these games play an important role in the bio-motor, psychosocial, educational and moral development of children. Additionally, traditional games can help address health priorities in developing countries. Using an ethnographic study in western Kenya, Ogoye (2005) explores the potential of using cultural constructs such as traditional games as a means of health communication and concludes that education and communication meant to lead to behavioural change in a complex cultural setting should be culture specific and internally derived. Significantly, cultural constructs like traditional games can provide 'rootedness' in terms of HIV/AIDS communication and intervention.

Zambian physical educators have been at the forefront of an effort to revive traditional indigenous games and movement activities as a vehicle for physical education. Seminal to the widespread adoption and application of traditional games in physical education in Zambian schools is the University of Zambia’s Musheke Kakuwa and his book *Zambian Traditional Games and Activities* (2005). There are several distinct advantages to traditional games and movement activities in an educational setting: they draw upon rich Zambian cultural traditions, linking school children with their elders. Given their novelty to contemporary learners, they put all of them, including those with experience in competitive sports and those with none, on roughly the same footing. They help integrate girls and boys in the same activities. And they rely upon minimal equipment, an important consideration in the facility-deprived Zambian context. These advantages can only be realized with significant commitment from both school administrators and instructors. This echoes Whitson’s (1983) view on the role of the

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school in promoting the traditional game of shinty in Scotland:

The plain facts are that rugby (and other games) are “made more attractive than shinty to the boys in the schools” by the actions of most physical education departments: by their priorities in equipment purchase, by the enthusiasm with which physical education teachers promote the sports they themselves coach, and most significantly by the absence of shinty instruction and practice time within the curriculum. (p.151)

Sutton-Smith (1985) argues for a more cautious approach to the promotion of traditional games in schools. Sutton-Smith (1985) challenges the use of schools for the preservation of selected traditional games and concludes that where traditions are not a direct expression of the life of a people, they cannot be preserved in their earlier character. The author further notes that scholars should think clearly about what they wish to preserve and who gains an advantage by such preservation, since what is preserved is a new performance culture suitable for possibly a different audience, rather than being an uncontrived natural expression.

Any discussion of the authenticity of the culture revived lies beyond the scope of this study. What is pertinent is that traditional games in Zambia offer a strategic incentive for receiving government support for the community. And appropriately implemented, the games can contribute to the educational development of children, provide an interactive learning environment for learning about HIV and contribute to restoring and promoting cultural pride and values.

2.7 Sport for Development

Sport and physical education, often overlooked and essentially peripheral subjects in most national and provincial curricula, can contribute to the attainment of national development goals. Increasingly, governments, UN agencies and international and local NGOs are mounting efforts to remobilize sport as a vehicle for broad, sustainable social development, especially in the most disadvantaged communities in the world (Kidd, 2008). In education, sport and physical activity can contribute to student retention, improved academic performance and safer schools. In Namibia, for example, the Physically Active Youth (PAY) program has demonstrated that, appropriately
implemented and combined with academic counseling, the engagement of youth in physical activity programs can significantly improve the academic performance of students previously identified as likely to fail (Kidd, 2008).

The most comprehensive policies and programs of international assistance in sport for development can be found in Norway, Switzerland, and the United Kingdom (Kidd, 2008). Organizations such as the Norwegian Olympic Federation (NIF), the Swiss Academy for Development and UK Sport are notable in this regard. Right to Play and Commonwealth Games Canada have been equally instrumental in the delivery and promulgation of sport for development programs in Africa and the Caribbean, respectively.

Until recently, much of the literature used in support of the programs has been uncritical of sport for development activities. The literature has not demonstrated strong evidence of effective monitoring, the evaluation of programs or comprehensive research into the long-term impact of these activities (Kidd, 2008, p.376). The recent work and commentary of Coalter (2006), Darnell (2007), Darnell and Hayhurst (2012), Donnelly (2008), Giulianotti (2004) and Kidd (2008) are significant in that they have asked questions of the sport for development movement and challenged practitioners to better understand under which conditions desired outcomes may be achieved. And they have exposed the tendency towards ‘sports evangelism’ within the movement. In effect, these authors have offered a much more realistic view of how sport for development is experienced and exercised on the ground. Significant as this work may be, missing from this body of literature are analyses conducted by indigenous scholars and practitioners. Where local NGOs are cited in the literature, too often this is done by non-indigenous organizations, practitioners and scholars. Much work remains to be done in this regard.

A key first step in building this body of literature is to have more work written by indigenous scholars and to explore precisely the circumstances under which sport may result in positive outcomes for gender relations, disability inclusion, youth development, mental health and peace and conflict resolution (Kidd and Donnelly, 2007). In their review of the literature on the benefits of sport, Kidd and Donnelly (2007) point out that these benefits appear to be an indirect outcome of the context and social interaction possible in sport, rather than a direct outcome of sports participation. They further note
that too often research is carried out under the assumption that positive benefits do result from sport, or with the intention of discovering the positive benefits of sport, without any critical examination of the results, which often get repeated in other literature.

Part of understanding the precise circumstances under which sport may result in development benefits comes from a particular evaluation of the programs. Coalter’s (2006) work on monitoring and evaluation in sport for development (SDP), *Process Evaluation and Organisational Development* (intended for use by practitioners in the global South), has articulated that SDP and peace do not necessarily go hand in hand and, echoing Donnelly (2008), that one needs to consider under what circumstances it may lead to desired outcomes. Coulter (2006) challenges practitioners to ask themselves what other contributing factors may have led to the desired change, in the process debunking the essentialist notions of sport, the universality of the sporting experience and the apparent inherent social positivity. Given that most practitioners conduct SDP activities without considering that sport may have the reverse effect—Giulianotti (2004) says the dysfunctional nature of sport can lead to sexism and xenophobia—Coalter’s (2006) findings are very useful to practitioners.

Giulianotti (2004) warns us that the recent movement of so-called sports evangelists from the West to the global South may constitute a form of neocolonialism, which serves to highlight the potential for imbalances of power between donor and recipient within the sport for development movement. Fundamental to Giulianotti’s (2004) argument is a concern about cross-cultural politics, particularly the complex dynamics of power and meaning behind cross-cultural ‘cooperation’ between donor and recipient groups. One of the legacies of colonialism is the association of power and knowledge with former colonies and, by extension, with individuals of Caucasian heritage. This legacy creates an environment in which Giulianotti’s (2004) concerns may in fact become reality.

Using testimonials of Right to Play volunteers, Darnell (2007) argues that within this movement, a well-intentioned and benevolent ‘mission’ of training, empowering and assisting is not only based upon but to an extent requires the establishment of a dichotomy between the empowered and the disempowered, the vocal and the silent, the “knowers” and the known (p.561). Such a dichotomy is based, at least in part, upon
(re)productions of race and the embodied racial other, and it gains political and social resiliency through the practices of development through sport while it is simultaneously influenced and complicated by notions of sport and play as apolitical, socially integrative and culturally transcendent (Darnell, 2007, p.561).

Darnell’s (2007) study manages to effectively demonstrate how race is implicated in relationships between the SDP practitioner and the recipient. Darnell’s (2007) use of critical race theory and his examination of the testimonials’ decontextualization help question who benefits from the use of sports celebrities and from the notions of the SDP volunteer’s benevolence and the racialized recipient’s gratefulness. His work is both poignant and illustrative of the challenges faced by SDP, since the movement can indeed (re)produce stereotypes, which begs the question whom SDP serves and whether, in the end, it might not actually be a trip undertaken by the Western volunteers to achieve cultural absolution (p.574).

Armstrong (2004) and Sugden (2006), writing about the use of sport in complex and divided societies, provide useful reminders of the dangers of conducting programs, but they also highlight the positive potential of sport projects—if they are locally grounded, carefully thought out and professionally managed—to make modest contributions to conflict resolution and peaceful coexistence (Sugden, 2006, p.221). Given the overwhelmingly essentialist rhetoric within the SDP movement, Sugden’s (2006) reminder that complex political and social problems are usually unresponsive to simplistic solutions and that approaching conflict resolution in a segmented and piecemeal fashion is unlikely to achieve sustainable results is both timely and useful (p.238). Significantly, Sugden (2006) emphasizes that culturally focused peace initiatives can work only when preceded by military and political accommodations. And, conversely, culturally focused peace initiatives work best within mature political peace processes (p.238).

Armstrong (2004) provides a sobering conclusion by noting that rehabilitation and reintegration projects are doomed to fail if there is no better life offered to the disaffected and demilitarized (p.498). Giulianotti (2004) contends that sport can have significant benefits in especially difficult contexts, but only when the ‘development’ projects are rooted in meaningful dialogue with recipient groups, and only when such programs are
accompanied by more direct policies to alleviate disease, hunger, war and forced migration (p.367). Meaningful dialogue and programs that address the everyday realities of participants are highly pertinent to the successful outcome of projects.

In my personal experience of conducting a youth empowerment program in Canada and Zambia, it became clear that irrespective of how participation in sporting activities contributed to greater self-esteem, this was almost irrelevant if the participants returned home to no food or could not clearly articulate in official languages. This reality leaves participants vulnerable to economic, psychological and sexual abuse irrespective of any self-esteem gained from sport, as survival is paramount. It is usually the case that SDP volunteers will spend the day running programs and then return to middle-class neighborhoods; as such they are unable to experience the realities of living in the impoverished areas they work in. Indigenous scholars and practitioners have a role to play here in exposing the harsh realities and choices facing participants both at home and in their communities.

Echoing Darnell (2008) and Giulianotti (2004), I believe that much work remains in addressing the cross-cultural politics and the dynamics of power between donor and recipient groups. During my pre-research visit to Zambia I participated in a conference on physical education and school sport funded by the British Council and UK Sport, where these concerns were evident in the interactions between Zambian and British participants. Of particular concern was the relative acceptance of the British model of physical education and the limited discussion of this model’s appropriateness. Sport for development is more than a reflection of traditional development aid, as it consists of sets of relationships produced by social actors interacting with one another.

2.8 Educational Policy and Program Evaluation

The word ‘policy’ is understood to mean many things to different groups. McDonald and Elmore (1987) consider policy to be a course or principle of action adopted or proposed by a government, party, business or individual. An instrumentalist view of government conceptualizes policy as a tool to regulate a population from the top down, through rewards and sanctions, and, as such, policy is an intrinsically technical, rational and action-oriented instrument that decision makers use to solve problems and to affect change (Shore and Wright, 1997, p.5). Ball (1998) defines policy as a system of
values and symbolic systems, ways of representing, accounting for and legitimizing political decisions, and he suggests that policy making is inevitably a process of bricolage. Apthorpe (1997) defines it as a form of wording and willing with language intended to please and persuade rather than to inform and to describe (in Shore et al., 1997, p.20). Koestler (1967) considers policy to be the ghost in the machine, the force that breathes life and purpose into the machinery of government and animates the otherwise dead hand of bureaucracy (cited by Shore and Wright, 1997, p.5).

The policy research literature highlights a tendency to present policy making and evaluation as a neat and tidy process of problem identification, the appraisal of policy options and, finally, implementation and evaluations. The model policy lifecycle for public sector institutions such as government Ministries of Education prescribes a linear and iterative process. As a model it reflects the ideal, but the actual process of policy development is not ideal. The following illustration from the Ontario Public Service depicts this ideal policy formulation process.

**Figure 2.7: Policy Lifecycle**

Source: Ontario Public Service (2011), Learning and Development, Centre for Leadership and Learning

The presentation of the policy-making process as linear comes at the expense of acknowledging the complexities associated with enactment and implementation—from the central policy-making arm of government to the schools where the policy is
implemented and experienced by target audiences (in the case of the education sector). The presentation of this neat and tidy process often results in a prescriptive tone in the evaluation literature. Normative statements are then used to suggest how policy should be made. Apthorpe (1997) further suggests that attention should go beyond words in policy and also address the style used in writing: the success of a policy depends on the style going unnoticed (in Shore and Wright, 1997, p. 20).

Shore and Wright (1997) have suggested that policy analysis and evaluation be conducted from an anthropological perspective. According to them, policy provides a powerful conceptual tool for analyzing the processes and agencies of government, while an anthropological perspective offers the potential for a radical reconceptualization of the field—not as a discrete local community or bounded geographical area, but as a social and political space articulated through relations of power and systems of governance.

Shore and Wright (1997) offer a useful example of an anthropological approach to policy. According to Shore and Wright (1997) such an approach can be absolutely traditional in the sense that it is standard anthropological practice to focus on a concept that appears axiomatic and unproblematic to the people concerned and to explore its different meanings and its effectiveness as an organizing principle of society. When one focuses on policy, the field of study changes: it is no longer a question of studying a local community or ‘a people’; rather, the anthropologist is seeking a method for analyzing connections between levels and forms of social process and action and exploring how those processes work at different sites—local, national and global. Shore and Wright (1997) argue that this is akin to “what Reinhold (1994, p. 477–79) calls ‘studying through’: tracing ways in which power creates webs and relations between actors, institutions and discourses across time and space” (p. 14). Given Zambia’s recently decentralized education sector, using this perspective would mean analyzing the connection between the school and the central administration, as well as the levels in between.

The complexity of the various meanings and sites of policy suggests that policies cannot be studied by participant observation in one face-to-face locality. The key is to grasp the interactions (and disjunctions) between different sites or levels in policy processes. Thus, studying through entails multi-sited ethnographies that trace policy
connections between different organizational and everyday worlds, even in cases where actors in different sites do not know each other or share a moral universe (Shore and Wright, 1997). Within the field of education, several luminaries (Ball, 1999; Clune, 1989; McDonald and Elmore, 1987; McLaughlin, 1987; Oakes, 1989; Werner, 1990) have long recognized the complexities associated with policy implementation and analysis. Werner (1991) highlights the uncertainty associated with policy making, Ball (1999) and McLaughlin (1987) demonstrate the significant influence of context and Clune (1989) effectively shows how schools can mediate, critique and construct policies.

Taylor and colleagues (1997) highlight the significance of problem definition and challenge policy analysts to consider the purposes of their analyses in the first place, as well as to understand the substantive issues with which the policy deals. This first step helps shape the questions to be pursued in the process of policy analysis and makes one’s theoretical approach (positivism, interpretivism, critical theory) apparent. Crucially, Taylor and colleagues (1997) caution against oversimplification and the arbitrary use of levels of analysis (macro, meso and micro), instead suggesting the need to take into account the interactive, non-linear nature of the relationships between the three elements of the policy circle or cycle. This circle encompasses the contexts of influence, text production and production (p. 44). Taylor and colleagues (1997) argue that policy analysis in this regard can be concerned with one or all stages of the policy circle and warn that the analytic process involves more than a narrow concern with merely a policy document or text. The implication is that an understanding of the background and context of policies includes their antecedents and relations with other texts, as well as the short-term and longer-term impact of practices. A framework of analysis would therefore distinguish between the contexts, texts and consequences of policy.

Reflecting on experiences of implementation, McLaughlin (1987) considers some of the major lessons for policy, practice and analysis: policy cannot always mandate outcomes at the local level; individual incentives and beliefs are central to local response; effective implementation requires a strategic balance of pressure and support; and policy-directed change is ultimately a problem of the smallest unit. McLaughlin (1987) concludes that the challenge for the next generation of implementation analysts will be to integrate the macro world of policy makers with the micro worlds of individual
implementers. These conclusions and lessons are borne out of the appreciation that bringing about change, especially through many layers of government, is challenging, as policy makers cannot mandate what matters and as, critically, policy success depends on local capacity and will. Although it is challenging, the policy maker or government can address capacity through several measures. Yet the will or the attitudes, motivations and beliefs that underlie an implementer’s response to policy goals or strategies are less amenable to policy intervention (McLaughlin, 1987, p.174).

McLaughlin (1987) highlights the individual rather than institutions and suggests that implementers at all levels of the system effectively negotiate their responses, fitting their actions to the multiple demands, priorities and values operating in their environment (p.175). Accordingly, a view of implementation as a process of bargaining or negotiation makes it evident that policy effects are complex, sometimes hidden or insurmountable and often unanticipated. McLaughlin (1987) thus urges adopting a model of social learning and policy analysis that stresses reflection and assistance to ongoing decision making (as opposed to a positivist model). Understanding the contextual factors associated with programs becomes critical. Ultimately, McLaughlin (1987) suggests keying questions and methodologies to the point in the process under study, to the needs of significant decision makers, and establishing a regularized system of actors at all levels of the system. This might ensure that policy analysis and evaluation become both contingent on and as regularized as the process they seek to understand and inform (p.177).

Elmore (1979) argues that there are at least two distinguishable approaches to implementation analysis: forward and backward mapping. Forward mapping begins with an objective, elaborates an increasingly specific set of steps for achieving that objective and states an outcome against which success or failure can be measured (p.20). This approach is most common in policy analysis and in the critical path method (CPM). Elmore (1979) suggests that this approach’s most serious problem is its implicit assumption that policy makers control the organizational, political and technological processes affecting implementation. Elmore further suggests that neither administrators nor policy analysts are very comfortable with the possibility that much of the implementation process cannot be explained by the intentions and directions of policy
makers. This leaves Elmore (1987) to conclude that assuming more explicit policy directives, greater attention to administrative responsibilities and clearer statements of intended outcomes will improve implementation. Forward mapping reinforces the myth that implementation is controlled from the top. Further, Taylor (1979) argues, forward mapping as an analytic strategy only treats a narrow range of possible explanations for implementation failures. Taylor (1979) thus suggests backward mapping, which explicitly questions “the assumption that policy makers ought to, or do, exercise determinant influence over what happens in the implementation process” (p.20). It questions the assumption that explicit policy directives, clear statements of administrative responsibilities and well-defined outcomes will necessarily increase the likelihood of successful policy implementation. Backward mapping begins at the last possible stage, the point at which administrative actions intersect with private choices. It begins not with a statement of intent, but with a statement of specific behaviour at the lowest level of implementation—a process that generates the need for a policy. Only after behaviour is described does the analysis presume to state an objective, with the objective first stated as a state of organizational operations and then as a set of effects or outcomes that will result from those operations. With a relatively precise target at the lowest level of the system, the analysis backs up through the structure of implementing agencies, asking two questions at each level: What is the ability of this unit to affect the behaviour that is the target of the policy? And what resources does this unit require to have that effect? Taylor suggests that the final stage of analysis that the analyst or policy maker describes is a policy that directs resources at the organizational units likely to have the greatest effect.

A key contribution of Elmore’s (1979) work is to highlight how the framing of questions from the top or the policy-maker level begins with an understanding of what is important at the lower levels of the policy process. An implication of Elmore’s (1979) approach is that the more direct the path for reaching the point of contact, the greater the likelihood of affecting that behaviour. It implies greater delegated discretion and fewer hierarchical controls. The challenge is therefore not to determine where a government should allocate resources but to understand where in the complex relationships of the policy implementation process are located those individuals who are closest to the
problems and the resources they need to address them. In this sense, backward mapping connects policy decisions directly with the point at which their effect occurs.

Clune (1990) looks at curriculum policy in the school context and suggests that policies are mediated, critiqued and constructed by schools. Clune (1990) focuses on the level of school planning, rather than on teaching per se, and therefore does not concentrate on the interaction of curriculum policy and instructional practice. Clune’s (1990) work usefully reminds us that while schools may need to adapt to policies, they may also demonstrate that policies need to change. In other words, schools can inform policies. Clune (1999) points out that research in the school context can demonstrate that a policy is unworkable rather than in need of further refinement (p.266).

According to Clune (1990), the school as a policy mediator offers the least critical perspective. He suggests that schools will exercise great discretion under the cover of formal compliance to a policy to meet the goals of the policy. As a policy critic, Clune (1990) suggests as the essential message that a policy has failed to meet the intended goals if the school cannot meet them given the realities of its context. The implication is that policy goals should be abandoned or restructured in such a case. In this regard, a school may demonstrate that a policy is unworkable (p.266). A policy constructor perspective allows for the possibility that schools can be sources of alternative policies, rather than simply acting as mediators and critics. The use of different perspectives further highlights the importance of an appreciation of the various normative standards operating in the school and policy contexts. This is in addition to an awareness of the possibilities of differing political and educational goals.

Given the hierarchical and formal nature of the education system in Zambia, Clune’s (1990) assertion of schools exercising discretion beneath formal compliance to policy is interesting and similar to the idea of the ‘hidden curriculum’. What is challenging from a researcher’s point of view is how to detect or elicit responses from research participants that reveal these discretionary activities. Given the formal working environment, participants may genuinely fear being sanctioned for being forthright about schools’ and institutions’ responses to policies. Additionally, Clune’s (1990) focus on the

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10 Giroux (1983) defines the hidden curriculum as those unstated norms, values and beliefs that are embedded in and transmitted to students through the underlying rules that structure the routines and social relationships in the school and its classrooms.
level of school planning is a useful reminder of the many influences on the outcome of policies. In the context of the 2006 Presidential Decree, Clune’s suggestion to focus on school planning reminds us not only to concentrate on what teachers are doing (or not) but also to pay attention to how the school is organized and the resulting implications.

Werner (1990) reminds us of the sometimes unrealistic expectations of curriculum reform. Werner (1990) notes how the assumption of a linear sequence of events in curriculum revision—that curriculum revision leads teachers to alter their practice, which results in a change in student learning—is fraught with many uncertainties. Werner emphasizes that curriculum changes by themselves do not necessarily lead to the desired learning opportunities and outcomes, and teachers also do not simply “translate” prescribed goals into reality (p. 105). As such, the curriculum is one of many influences on the classroom, including the particular school’s resources, priorities, leadership and socioeconomic context.

In trying to answer why there is an uncertainty of outcomes exists, Werner (1990) focuses on curriculum development, implementation and the sociopolitical context. Within curriculum development, uncertainty can stem from the value-laden nature of questions to be answered at this stage. These questions include those pertaining to content (what should be taught?), distribution (for whom?) and timing and involvement (who should decide?), none of which, Werner (1990) argues, are predetermined (p. 108).

Outcomes are uncertain because teachers interpret the policy and decide what will be done in their classroom, and when and how it will be done. This is in addition to the hidden curriculum and expectations by students and parents. Reflecting on uncertainty due to sociopolitical context, Werner (1990) focused on the influence of external stakeholders and interest groups. He raised questions such as whose views are actually represented in debates about the content of the curriculum, the political and economic interests being served and the implications of these influences in light of other programs within the school (p. 113).

Werner’s (1990) focus on external stakeholders is relevant to the case of education in Zambia, and to physical education there specifically. As discussed earlier, donors and multinational agencies such as the IMF have a significant influence on education outcomes through funding the education sector and through the conditionalities
they impose on governments, such as wage freezes for public sector workers. These forms of influence can have a profound effect on education outcomes and, by extension, on policies such as the 2006 Presidential Decree. Teacher unions, religious organizations, parent associations and non-governmental sports organizations are some of the other stakeholders likely to have had an impact on the 2006 Presidential Decree.

2.9 Context and Politics of Implementation

The context and politics in Zambia, and within the Ministry of Education specifically, in many ways determine the outcomes of policies such as the 2006 Presidential Decree. An appreciation of this context with regards to cultural subtexts, ‘optics’ of projects and research and previous or historical arrangements between key stakeholders is therefore essential if one is to conduct research in Zambia. This section draws on my experience of living and working in Zambia, particularly in recent years as a ‘Canadian’ development practitioner representing the University of Toronto. In this section, I highlight three issues that I believe worthy of consideration and that have informed the approach I undertook in this study. In determining what steps to take, I confronted the constant dialectical tension of striving to meet the demands for transcendent criteria (adequacy of data, interpretation and social validity) for a rigorous research study and the political validity of the appraisal of the implementation of the 2006 Presidential Decree on Physical Education.

2.9.1 Role of Donors

Donors have played a significant role in the development of physical education in Zambia. Most notably, the Norwegian Olympic Committee has supported the University of Zambia’s Physical Education Unit and was a co-host of the influential 2005 International Sport for Development Conference held in Zambia. Commonwealth Games Canada, through support of the Canadian International Development Agency (CIDA), and Canadian Heritage have supported local NGOs and been involved in health campaigns. UNICEF has supported the Curriculum Development Centre of the Ministry of Education, specifically on physical education. The University of Toronto has been influential in efforts to revive physical education at the university and teacher-training levels. The University of Toronto and UK Sport co-funded the 2006 Workshop on the Use of Physical Education, Sport and Traditional Games for HIV/AIDS Prevention.
Spearheaded by Zambians and Canadians, the workshop resulted in the pronouncement of the Presidential Decree, mandating that physical education be compulsory and used for HIV/AIDS prevention. The present study is based on this workshop.

Most recently, UK Sport (through the British Council) sponsored a conference on Zambian physical education and sport in March 2009. The British Council has taken a lead role in working with the Ministry of Education to revitalize the Zambian physical education curriculum. This is part of the London 2012 legacy program called International Inspiration. The program aims to support physical education and sport in developing countries around the world. In the run-up to the conference, UK Sport and the British Council sponsored a delegation of Zambian Ministry of Education officials to visit the United Kingdom to explore and learn about physical education in England. This delegation consisted of teachers, principals and provincial and senior-level national administrators. It is significant that senior administrators participated in such a visit, because sport does not receive a lot of attention in the national curriculum. Of interest here is that when Zambia hosted the 2005 sport for development conference, the UK was bidding for the 2012 Olympics. The Zambian president, who attended the conference, made it clear to fellow African Olympic voting countries that Zambia would campaign for Britain.

With regards to implementation, the overall message here is that views and experiences of donor countries may reflect the recent developments and interactions (or not) that individuals may have had with these sport for development organizations. With the adoption of so-called Sector-Wide Approaches (SWAps) in aid funding, the influence of donors on particular sectors in the country is likely to be considerable. SWAps are new forms of donor funding in which donors pool their resources to support a particular sector, rather than providing individual project support. A common feature of SWAps is that donors agree and support a shared sector-wide policy and strategy with defined targets and results. Additionally, a division of labour of sorts takes place, such that donors select which sectors (e.g., education, health, trade) they will support. In Zambia, some of the donors supporting the education sector are the U.S., British, and Dutch governments. With pooled resources, the influence of donor decisions is thus likely to be even greater, given the sizeable amount of the funding support. Donors are more likely to speak with
one voice under SWAps, and with this reality comes a need to identify and prioritize a sector to support. Donor preferences with regard to sector priorities under SWAps are potentially also likely to come up against priorities chosen by the government.

2.9.2 Politics of Representation

Here I wish to highlight how problem identification is crucial and can either draw vital stakeholders to program evaluation or push them away. Additionally, problem identification can shift the focus and discussion from the essential items of analysis.

If one defines the problem of physical education and traditional Zambian games (PETZG) as one of teachers short-changing students by providing misinformation or no teaching at all, it is bound to pit teachers against administrators and to contribute to the already strained relationship between the Curriculum Development Centre and teachers and teacher unions. If, however, one conceives the problem as one of understanding how PETZG and the Presidential Decree are making an impact in schools, one is able to get more institutional and individual support from both teachers and administrators. Of course, there is always the possibility that PETZG and the Presidential Decree have not had any impact at all.

Related to the above, the choice of words is important. A suggestion of discourse analysis may be perceived as scrutinizing all things that have been said and written, evoking thoughts of being monitored. As noted earlier and echoing Clune (1990), schools may exercise discretion regarding their implementation of the decree, and the choice of words used to inquire about any potential discretion exercised by schools may dissuade research participants to be forthcoming about the response of schools to the decree.

While the particular words that elicit comprehensive feedback are worth exploring further, such work lies beyond the scope of this study. To overcome the above-mentioned issues and to maintain political support for my research, I use the terms ‘program evaluation’ and ‘critical analysis’. ‘Program evaluation’ is a common term in Zambia and is not seen as invasive. Using it has led to and facilitated ongoing discussion, as well as a critical analysis of the current curriculum and its potential to provide necessary skills for the future. The word ‘critical’ is therefore timely and allows me to remain true to the aspirations of the methodology of critical theory.
2.9.3 Size of Sport and Physical Education Community

The physical education community is very small in Zambia. For example, there are six Zambians with graduate degrees in physical education, one of them working at Solent University in England with a doctoral degree. Most physical educators in Zambia were taught by Musheke Kakuwa of the University of Zambia. I raise this issue because his students may not want to contradict him or oppose programs supported by him. At the same time, as someone associated with the University of Toronto, I am likely to be viewed as someone who could influence the selection of the University of Zambia/Toronto Scholarship candidate to study in Toronto.

The considerations stated above, along with the literature that highlights an educational sector that has struggled to catch up with the needs of the country since independence, in a country deprived of necessary resources due to SAPs, help contextualize the thesis research and respond to the oft-raised question of observed social phenomena, that is, the question under what circumstances the experiences and results of the study can be produced or replicated. An appreciation of the country’s sociopolitical history and its influence on the education sector and the sport and physical education community helps identify solutions to known challenges and to gaps in the literature. Indeed, this appreciation is essential to answering the question of how sport and traditional games can contribute to a country’s national education sector in addressing HIV/AIDS, which this thesis seeks to answer.

2.10 Conclusion and Summary

The choice of critical perspectives is particularly useful for this study as the literature reviewed points to the need to consider the dynamic sociocultural and political environment in which the decree was enacted and is being implemented. The goals of education are influenced by government priorities, and at the same time, geopolitical factors, such as Zambia’s experience with structural adjustment programmes, is revealed. Critical and postcolonial perspectives are helpful in illuminating how colonial legacies have systematically, within education and broader society, privileged certain groups (males over females) and knowledges (Western over traditional). An appreciation of these issues is therefore necessary before assessing how teachers and administrators have reacted to the 2006 Presidential Decree. The education policy literature suggests that
there are no easy answers, that the policy environment, from development to implementation, is complex and that policies may not necessarily dictate behaviour. While it remains cautious, the literature suggests that the experience gained from the development and implementation of policies such as the 2006 Presidential Decree is nonetheless valuable and can inform future policies.
Chapter Three:
Methodology and Methods

3.1. Introduction

In this chapter I seek to outline the methodology and methods that I adopted for this study. In seeking to describe the study’s methodology and methods, Carter and Little’s (2007) reminder that good qualitative research attends to the three elements of epistemology, methodology and methods while demonstrating internal consistency between them is apt. Epistemology is the study of the nature of knowledge and Carter and Little (2007) suggest it is a way of “justifying knowledge” (p.1317). I situate myself within critical epistemology and consider social reality to be historically constituted and (re)produced by people. This epistemology informs my methodology and methods. In this study I use Harding’s (2008, p.2, in Carter and Little, 2007) definition of methodology, which describes it as “theory and analysis of how research should proceed”, which Carter and Little (2007) consider as “a way of justifying method” (p.1317). The methodology in this study draws on critical theory, feminist, postcolonial and educational policy constructs. Methods are “techniques for gathering evidence” (Harding, 2008), or what Carter and Little (2007) consider as “taking research action” (p.1317). Methods are based on the nature, aims and goals of the research. In this study I used multiple methods to generate data, including interviews, document analysis, observations at physical education conferences and workshops.

Given that methods are based on the nature, aims and goals of the research, it is useful to restate the research aims before illuminating and describing my methodology and the methods I adopted. This study sought to provide an analysis of the rising influence of the sport for development movement and of the ways in which physical education and traditional Zambian games may address HIV/AIDS within national education in Zambia. Central to the study is the response of teachers and education administrators to the 2006 Presidential Decree on physical education described in chapter 1. As noted earlier, the research objectives were:

1. To evaluate the implementation of the Presidential Decree on physical education as a strategy for addressing HIV/AIDS through PETZG.
2. To explore and understand the response of teachers and administrators to the implementation of the 2006 Presidential Decree on physical education.

3. To explore how the school context influences the implementation of the Presidential Decree.

4. To map a critical path of key personnel and their resource requirements, and to make recommendations for strengthening the effectiveness of HIV prevention education.

In this study I adopted a critical sociological approach or an activist approach to research that seeks to bring about desirable social change. As Smith (1993) notes, “critical social and educational inquiry integrates theory and practice in a way that not only makes transparent to people the contradictions and distortions of their social and educational lives, but also inspires them to empower and emancipate themselves” (p. 92). In describing the methods and methodology undertaken in the study, I begin by illuminating my role as a researcher and describe the research design and framework I use.

3.2 Researcher’s Role

Within qualitative research, the presence of the researcher—from inception to conclusion—is central. Among other things, the researcher determines the collection and interpretation of data. Theoretical traditions differ with regards to the degree of subjectivity and the role of the researcher in illuminating intersubjective elements: interaction, discourse and shared meanings (social constructionists); how unconscious processes are structured and influence the researcher, participants and data gathered (psychodynamic); or how the researcher’s lived experience can assist in a greater understanding of the fusion of subject and object in the research process (phenomenology). The importance given to the presence of the researcher varies widely. Some approaches recognize the researcher’s agency and subjectivity, while others consider his or her objectivity (when the researcher is distanced from the research process).

The presence of the researcher remains contested both within and from without qualitative research. Critics from within the field argue that the presence of the researcher presupposes a “critically self-conscious researcher who has unproblematic access to subjective motivations and feelings” (Finlay, 2002, p.542). From outside the field,
critique surrounds the legitimacy of personal disclosure and subjective analysis as research tools (Finlay, 2002, p.543). The methods and methodology described in this chapter are, in part, a response to this critique. They constitute a coming ‘out’ by this author in response to Finlay’s (2002) quest “to ‘out’ the researcher’s presence by exploring the provenance, process and practice of reflexivity” (p.532).

Reflexivity, as defined by Finlay (2002), is “thoughtful, conscious self-awareness … continual evaluation of subjective responses, intersubjective dynamics, and the research process itself” (p.532). Finlay (2002) argues that “coming out through reflexive analysis is ultimately a political act and has the potential to enliven, teach and spur readers toward a more radical consciousness” (p.544). In other words, she considers reflexivity a tool that can allow subjectivity in research to be transformed from a problem to an opportunity. While reflexivity can allow for rich data, there is also the danger of essentializing the researcher’s role within the research process. To address this, I pay particular attention to my interactions with participants and to how the power dynamics between researcher and participants influence data gathering.

In this chapter, I use Finlay’s definition of reflexivity to help contextualize the design methods and methodology used in the data collection and analysis stages of the study. Finlay (2002) refers to this as “reflexive accounting” within the research process. This is a critical evaluation of my position in the research process and as such necessitates me locating myself theoretically, providing the context of HIV prevention education and ensuring theoretical consistency.

3.2.1 Reflexive Accounting
Finlay (2002) views reflexivity as a valuable tool for examining the impact of the position, perspective and presence of the researcher; for promoting rich insight through examining personal responses and interpersonal dynamics; for evaluating the research process, method and outcomes; and for enabling public scrutiny of the research’s integrity through a methodological log of research decisions. Reflexivity in research involves reflection on self, process and representation. It is the critical examination of power relations and politics in the research process, as well as of accountability in data collection and interpretations (Jones et al., 1997; Falconer, Al Hindi, and Kawabata 2002). Visweswerean (1994) considers reflexivity as an approach to question the
researcher’s authority, to confront his or her process of interpretation and to emphasize how the researcher knows what he or she does (in Denzin and Lincoln, 2005, p.262). Hertz (1997) likens reflexivity to having an ongoing conversation about the experience while simultaneously living in the moment (p.viii). Sultana (2007) argues that being reflexive about one’s own positionality is not self-indulgent; instead, reflexivity allows the researcher to reflect on how he or she is inserted into grids of power relations and how that influences methods, interpretations and knowledge production (p.376). In this study I found the process of engaging in reflexivity beneficial to how I came to understand my influence on the data gathered, particularly to how my indigenous and Canadian experiences influenced my interactions with research participants.

3.2.2 Locating the Author in the Research

In seeking to transform my subjectivity into an opportunity and to contribute to the body of literature on sport for development as an indigenous scholar, I do so, as Kidd (2008) refers to it, as a moral entrepreneur—as an advocate and organizer (p.371). In this role, I have participated in a cross-cultural youth empowerment program (through sport), pairing youth from Lusaka and Toronto with the private and public academic sectors in Zambia and Canada. Professionally, I have worked on a program at the University of Toronto that partners with the University of Zambia to strengthen teacher education as a strategy for HIV/AIDS prevention. I continue to contribute to this program and to maintain contact with key stakeholders in Zambian physical education and in the sport for development movement. My previous research has focused on Zambian HIV/AIDS policies with reference to Uganda (D. Njelesani, “Zambian HIV/AIDS Policy with reference to Uganda”, Halifax, Dalhousie University, unpublished thesis).

In locating myself in the research process, I am interested in exploring my positionality as it relates to my insider/outsider status, my previous work in Zambia as it relates to the focus of my area of research, and the intersubjective and subjective elements that may have influenced my research designs, goals, data gathering and analysis. The exploration of these factors contributes to the evaluation of my research (validity, integrity) and may illuminate opportunities for the empowerment of individuals and communities, as well as the power dynamics at play when addressing HIV/AIDS in the education sector. As a researcher, I locate myself in the critical social paradigm
informed by Freire (1972), and I am interested in unmasking instances of power inequalities and in how certain voices in the policy process are made authoritative while others are silenced.

3.2.3 Insider/Outsider and Transnationality

I am a male Zambian citizen living in Canada. I left Zambia in my teenage years, attending boarding school and university in England before moving to Canada for my graduate education. In the fifteen years since I left, I have returned to Zambia for three-month summer vacations and have maintained my childhood friendships. From 2003 to 2007, I worked full-time with the University of Toronto on a capacity-building program for universities addressing HIV/AIDS in five African countries. In Zambia, this work has involved conducting national HIV/AIDS training workshops for Zambian physical education teachers. While this experience is not necessarily unique for middle- and upper-class Zambians, two aspects of this experience do stand out: the history of friendships with people I have known since I was ten and my involvement in ‘development’ work in Zambia with a Canadian institution. This experience makes me both an insider and an outsider. I am an insider as a Zambian and as someone who has contributed to the development of prevention education through physical education in Zambia. My surname is also associated with family members who worked in the public service sector prior to our family leaving the country. This gave me great insight into the nuances and cultural subtexts during the research-inception and data-gathering phase. It also facilitated access to community ‘gatekeepers’ whom I had known and worked with. However, I am also an outsider because I do not have a physical education background (my graduate degree is in economics), I am middle class, I do not live in Zambia, and I am associated with Canada and the University of Toronto (U of T). My U of T connection brings with it the expectation that I will participate in educational policy workshops in Zambia and that I can assist with applications for an exchange scholarship sponsored by the two universities. At the same time, I may be perceived as someone who does not fully appreciate the challenges of daily life faced by Zambians and who has a romanticized view of the country. A challenge I face is to remember to speak the local languages (Bemba, Nyanja) to maintain my insider status and to avoid using English (with a non-Zambian accent), which can act as a barrier when interacting with
participants. Smith suggests that “one of the difficult risks insider researchers take is to ‘test’ their own taken-for-granted views about their community. It is a risk because it can unsettle beliefs, values, relationships and the knowledge of different histories” (1999, p.139). In this regard, spending more time with participants could have unraveled genuine feelings and perceptions of my role and involvement in this community that may have been contrary to my previous experience and feedback from clients, which had generally been positive, particularly as I would be presenting myself as an independent researcher and not as an employee of the capacity-building program that I worked for in the past. This definitely could have unsettled my belief that our work and my involvement made a difference to those involved.

As noted earlier, there is a danger of essentializing my presence as a researcher and obscuring—or worse, not paying attention to—the effects of power. The binary nature of the insider/outsider dynamic can be argued to be simplistic and not reflective of the complexity of the research process. Once one considers the concept of positionality and recognizes that one’s positions are fluid and dynamic, the idea of being either in or out no longer hold. Merriam and colleagues (2001) posit that the “reconstruing of insider/outsider status in terms of one’s positionality vis-à-vis race, class, gender, culture and other factors, offer us better tools for understanding the dynamics of researching within and across one’s culture” (p.405). Drawing on Narayan (1993), Merriam and colleagues (2001) suggest that factors such as education, gender, sexual orientation, class, race or the sheer duration of contacts may at different times outweigh the cultural identity we associate with insider or outsider status (Narayan, 1993, p.671–72).

My experience of living and working in Canada and Zambia thus leads me to consider how my transnationality influences the research. In particular, a transnational perspective and the concept of social fields are useful for attending to some of the issues raised by the question of insider or outsider status. On the concept of social field, Schiller (2005), drawing on Bourdieu, notes:

*Bourdieu used the concept of social field to call attention to the ways in which social relationships are structured by power. The boundaries of a field are fluid and the field itself is created by the participants who are joined in a struggle for social position.*
Whether they use the term transnational social fields or transnational spaces, scholars must develop an analysis of the fields of uneven power within which the networks they trace are constituted. Bounded concepts of diasporic identities may shroud social and political processes and relations of power including the exercise of systems of imperialism. (p.442–43)

With the concepts of social field and positionality I approached the research as a bearer of transnational power, more attuned to how to negotiate my power as researcher and to how to maintain a relatively even researcher/participant relationship.

### 3.2.4 Preparing for the Field: Positionality and Reflexivity

Sultana (2007) highlights one of several dilemmas faced by those in the diaspora upon returning to their home countries to work or conduct fieldwork, particularly in rural areas. Sultana (2007) notes that “what constitutes the ‘field’ versus home is a problematic distinction as returning to Bangladesh (country of birth) to do fieldwork was by no means returning ‘home’” (p.377). This issue reflects my own experience in Zambia, as I noted in the previous section when speaking about the insider/outsider challenge. However, it is worth re-emphasizing the constant negotiation of various locations and subjectivities that one feels a part of and apart from when one returns to the country of birth to conduct fieldwork, which I faced during the data-gathering phase. Sultana (2007) further adds that “the ambivalences, discomfort, tensions and instabilities of subjective positions become important to be reflexive about and work through, where the contradictions in positionality and in-between status had to be constantly reworked” (p.377).

In preparing for the field, my main concern was the ‘politics of representation’. I was mindful of attire, transport and ability to engage in regular conversation in the local dialect. Trying to ‘blend in’ is particularly salient here, as dressing in semiformal attire (dress pants and shirt) could identify me as not representing a significant institution when meeting Ministry of Education personnel, particularly as the focus of these meetings would be policy matters, and not the pedagogy of physical education. This is in contrast to wearing a suit, with which one can be perceived as representing a higher office and a person of significance. The reception one gets from a head of school may vary depending on whether one arrives at the school on foot, in a taxi, in a private car or in a government
vehicle, and this is not taking into account the type of car. This is significant when considering the process of being granted permission to conduct the study and to gain access to schools. Additionally, I found it necessary to use contemporary colloquial speech to maintain credibility within the community as someone who had not been ‘lost’. ‘Lost’ is understood to mean an individual who has been away from his or her native county for so long that he or she cannot recall local customs or speak with a common accent. A challenge of speaking the local dialect can also be addressing the implied meaning of words; in certain instances, I did not fully appreciate the implied meaning and needed to ask for clarification.

Of particular concern for me during the data-gathering phase was my credibility as a person knowledgeable about Zambian physical education and about how to manage the power imbalance between researcher and participant. While working in Zambia, I have witnessed individuals offering information that they perceived the inquirer to want to hear, either for fear of reprimand or of appearing uninformed about their work or because critiques of authority are rare. In this regard, community gatekeepers were helpful in understanding the nuances and cultural subtexts, particularly as they dealt with critiques of authority within the education sector. These gatekeepers were particularly helpful in introducing me to participants unfamiliar with my participation in training workshops for physical education teachers. This was crucial for building acceptance and credibility as someone who appreciated the day-to-day experience of a Zambian physical education teacher.

My approach to establishing credibility and to ameliorating power imbalances was to try to create an environment aimed at understanding what had happened since the Presidential Decree, allowing participants to share what they had experienced, what they thought worked well and what they thought could work better. This approach echoes the recent work of feminist scholars concerned with foregrounding women’s experiences during the data-gathering phase, in part to equalize the relationship between participants and researchers, and also to empower participants through the research experience (Merriam et al., 2001). I thought this approach would ease the power imbalance, because it was at odds with the hierarchical and bureaucratic environment individuals worked in. Merriam and colleagues (2001) in their study on power and positionality mention
participants subtly negotiating power away from researchers by “determining where and when the interview was held, who else would be present, and what information was shared” (p.413). I adopted this approach for the present study and conducted interviews in offices, schools and in two instances in a town other than where the participants lived and worked.

Wertz (1984) contends that the presence of the researcher in observation and interviews can lead to omissions and even fabrications, which are then mistaken as valid data (in Finlay, 2002, p.538). I relied on personal judgment as a way of addressing this issue and provided clear justification of why I considered the data collected to be authentic. England (1994) contends that “recognizing or being sensitive to power relations does not remove them” (p.85). I was concerned during this stage with giving voice to teachers and students, while at the same time trying not to place them at risk if they disagreed with current policies. Hence, I omitted identifiers such as name and school location in reporting the views and thoughts of participants. England (1994) also speaks of the potential of textual appropriation as a consequence of fieldwork. To ameliorate this, England (1994) suggests that in addition to sharing the text before publication for feedback and to writing multivocal texts that give voice to the researched, researchers should take greater responsibility for their research, acknowledging the inherently hierarchical researcher-researched relationship (p.86).

3.3 Research Study Design and Methodology

The research design was informed by Carter and Little (2007), Cresswell (2003), Denzin and colleagues (2008), Finlay (2002) and Morrow (2005). The study employs document and policy analysis; interviews; and observations at physical education workshops. Seventeen semi-structured interviews with teachers and administrators from four education districts of Lusaka Province were conducted as part of a study exploring the implementation of the 2006 Presidential Decree. The interviews were conducted between September and December 2009. Interviewees were purposefully selected to provide the richest data possible while capturing a broad range of views. The interviewees represented basic (8) and high (6) schools (average class size 60), special-needs teacher training college (1), the University of Zambia (1) and the Curriculum Development Centre of the Ministry of Education (1). The experience and years of
teaching ranged from 10 to 40 years. The analysis of government documents and websites was informed by Ball (1990), whose work on the British education sector was significant in revealing how new bureaucratic imperatives led to a new form of managerial power. Additionally, Shehu and Mokgwathi (2007) provide a relevant example of sports policy analysis in an African country. Shehu and Mokgwathi (2007), in their review of the Botswana government’s sports policy, revealed its sometimes contradictory messages of promoting elite sport for a few talented athletes and as leisure for the general public. This literature led me to adopt a critical lens of analysis for the government documents and for other materials used in the study.

Research on policy analysis (including education mandates) greatly shaped the research design by highlighting the complexities and uncertainty of the policy-making process (Shore and Wright, 1999; Werner, 1991), the important influence of context (Ball, 1999; McLaughlin, 1987; Oakes, 1987), the range of policy instruments available to the policy maker (McDonald and Elmore, 1987) and how the school can mediate, critique and construct policies (Clune, 1989). This literature stresses the significance of appreciating the local context, its associated particularities and how ultimately policies constitute value systems.

Drawing on literature on reflexivity, positionality and the need for “researchers to openly acknowledge tensions arising from different social positions in relation to such factors as class, gender and race” (Finlay, 2002, p.535), I was mindful of my own biases and presuppositions that might have influenced my research, particularly my role as a bearer of transnational power. Having located myself in the critical social paradigm with an interest in a social justice agenda and a desire to change policies in view of the fact that Zambian teachers continue to die from HIV/AIDS—even when the Ministry of Education has produced a number of HIV/AIDS policies during the past two decades—had the potential to influence the selection of focal issues as the main ‘problems’ worthy of study. My ongoing reflexive process was a way through which I tried to address this issue. For example, frustration with current policies can potentially lead to a narrow lens (effectiveness of prevention message) of focus at the expense of a wider lens that encompasses the bureaucracy and the education sector. Gatekeepers were equally helpful as I elicited their commentary and feedback on my proposed research questions.
3.3.1 Methods

3.3.1.1 Phase 1: Pre-research Inception

Prior to the research inception, I worked with community gatekeepers to develop a richer understanding of nuances and cultural subtexts, particularly pertaining to critiques of authority within the education sector. This phase lasted about 17 months and included attending a physical education workshop organized by the British Council in March 2009, meeting with physical education stakeholders in March 2009 and communicating by e-mail and phone up until the commencement of the study’s research phase in September 2009.

In July 2009, interview questions were tested with the gatekeepers and modified accordingly. These community gatekeepers included individuals working within the education sector, retired public sector workers and those working in the private/donor community. These gatekeepers were able to advise on the procedures for obtaining approval to conduct research within Zambian schools. My initial request to conduct interviews and classroom observation with participants (teachers and administrators) within the Ministry of Education (Appendix A) focused on the education offices of four provinces, four teacher training colleges, four high schools and the curriculum development centre. The request was for interviews with teachers and observation in the classroom. In consultation with gatekeepers and with my research committee, I planned on interviewing two cohorts: first, those who had participated in the initial workshop where the decree was announced and/or who had studied at the University of Zambia; and, second, teachers and individuals who were physical educators and administrators but did not qualify to be members of the first cohort.

On August 4, 2009, the Senior Education Standards Officer (SESO) at the Ministry of Education, who would be the primary contact for my study, granted me permission to conduct my research. The only condition was that my final research report be made available to the Ministry of Education (Appendix B). This phase represented a seminal stage of my reflexive accounting, a form of audit that would document the reflexive process from research inception to data analysis (Finlay, 2002).

Throughout this period, gatekeepers emphasized the need to respect the proper protocol (hierarchy) of the office or institution I was visiting. My experience reinforced
this as throughout the years I had witnessed the significance attached to protocol in my interactions with government representatives. In particular, I learned to speak to the head of a school and to introduce myself before meeting staff members. In our e-mail communications, the ministry SESO informed me that I would have to meet with the SESO in the provincial education offices. Both these officers would be able to advise me on my proposed list of schools and to provide a list of all physical education teachers in their respective provinces. Prior to my first meeting, I called the ministry SESO to arrange a time to meet. The SESO informed me that I could visit the ministry offices when I was ready to start and that there was no need to make an appointment.

I arrived in Zambia on September 15 and made arrangements to meet the ministry SESO on September 20, 2010. The day of the meeting, I arrived at the offices. Even though the SESO was meeting with individuals, I was allowed to sit in and wait until they had finished their discussions. The significance of hierarchy and formality was readily apparent from the dress of officials (business attire). In addition, it was apparent in how people were greeted. For example, people used ‘sir’ or ‘madam’ and did not refer to each other by first names. The ongoing discussions were general in nature and appeared to be those of acquaintances catching up. In such circumstances, it is easy to pick up on references to challenges, such as reaching distant schools during the examination period and the demanding schedule of conducting inspections.

During my meeting with the SESO, I was reminded of the need to share my research findings and of the tendency of many researchers, particularly those coming from outside Zambia, to renege on their obligation upon returning to their countries. I wondered how this would apply to me, as I was a Zambian who regularly returned and kept in contact with the physical education community, a ‘long-distance nationalist’ of sorts. Perhaps this individual was not aware of my previous work? I reassured the SESO, and perhaps myself, that this would not be the case, as I felt my involvement over the years in physical education demonstrated my commitment to education in Zambia. When asked for key advice the SESO could provide before starting the interview process, I was reminded of the need to introduce myself to the Provincial Education Officer (PEO)

11 Long-distance nationalism can be defined as a set of ideas about belonging that links people living in various geographic locations and that motivates or justifies their taking action in relationship to an ancestral territory and its government (Glick-Schiller and Fouron, 2001).
before meeting the SESO of that office. After our meeting, I waited for a period of time outside the office before I was introduced to the Director of Standards by the SESO. The director asked me what I thought my research would reveal and seemed knowledgeable about my aims, in particular about the process of being granted authorization to conduct the study. The director further inquired about when I thought I would finish and reminded me yet again of the need to share the final research outcomes. The director also emphasized the importance of Zambians returning to work in Zambia and told me I should come back after my studies.

Buoyed by the relatively straightforward process of introducing myself to the ministry and to the SESO in particular, I took the advice given to me and went straight to the PEO to make an appointment to introduce myself and my research aims. I still had to collect the list of teachers and determine which schools would be feasible to visit for the classroom inspections. To my surprise and shock, after informing the secretary at the PEO office about my research and showing my letter of authorization (and the application for authorization), I was told that the PEO would not be able to meet with me because the letter from the ministry was addressed to me rather than to the PEO and did not mention the PEO or the specific province. I responded that my request to conduct the research was for four provinces, of which Lusaka was one, and that the authorization was granted as such. The secretary insisted that she would have considered my request had the PEO been copied on the letter. While I found this process stressful, I tried to maintain a professional manner, spoke in English and referred to the secretary as “madam” throughout our conversation.

Frustrated with this response, I called the ministry SESO and explained what had happened. The SESO was not entirely surprised and referred to the need to respect protocol. She conceded that I would have to get a revised letter and that this might take several days. Reflecting on the experiences of the day, I found myself questioning why having the PEO copied on the letter of authorization was such a significant issue, given that the highest-ranking civil servant in the Ministry of Education had granted authorization for the research to commence in four provinces. I reflected on the various interactions I had witnessed between individuals in the offices I had visited and how they could, if possible, inform my research when it started. If I had conducted or presented
myself differently, would I have been able to get that appointment with the PEO? Since it was only going to be a brief meeting to describe my research and to get the PEO’s permission, was the process of getting the letter worth it? I knew several community gatekeepers who could assist me with obtaining the list of schools, which would allow me to start the research as soon as possible. However, would this be ethical and in keeping with my theoretical teachings on respecting cultures and working within existing processes? I felt strongly about the need to start in Lusaka Province, as I had immediate access to my community gatekeepers and would be able to meet with them and to adjust my research approach accordingly, should the need arise, before moving to another province where my professional support was not as strong and where I would essentially be by myself. Was I really an insider, or did these events confirm that I was an outsider? Why was I alternating between being an outsider and an insider in the space of a few hours?

As I thought about these questions, I realized that my research had already started and acknowledged the futility of the insider/outsider outlook to resolving my challenges. In the literature on methods and methodology, the research process is often presented as linear, with clear start and end dates. Perhaps I saw the first interview and classroom observation to be conducted as the start of the formal inception of my research. In fact, my research had already begun, but I was slow to realize that I had been unceremoniously inserted into its process.

On September 21, I returned to the Ministry of Education to meet with the SESO and to follow up on the revised letter. I was informed that the letter was not ready and asked to come back at the end of the week. It was not ready until October 16. Once the letter was signed, I was given a copy and told that the original had also been sent to the PEO. From September 21 to October 16, I visited the Ministry of Education on several occasions and got a real sense of the bureaucratic process. On some occasions I was told to wait as the SESO would be returning from school inspections during the ongoing school examinations. Mostly these occasions ended in frustration, as I did not end up seeing the SESO and my phone calls were not returned. I was informed that the letter had to be changed several times and that when it was ready for signing by the Permanent Secretary, parliamentary demands had interfered. More worrying, however, was the
escalating national fuel (gas) shortage gripping the country. In preparing for the meeting on October 16, for example, I spent well more than six hours waiting in line to get fuel. During this time, I reflected on how the delay in being granted a letter would impact my research: would I be able to visit all the schools and provinces I had planned to? The fuel crisis was certainly something I had not anticipated, and it remained quite unclear how I would adapt to it.

On October 19, I visited the PEO office at 9 a.m. and was informed that the PEO had left for the day. Additionally, my letter had not been received and thus I could not meet the PEO anyway. I offered to make a copy of my letter, but the secretary declined. The secretary suggested I return in the afternoon, as the PEO could have finished inspecting schools by then. Unfortunately, the fuel crisis meant I could not return to the PEO office, because I again ended up waiting well more than six hours in line, at the end of which time I was unable to get fuel.

On October 20, I reported to the office just before 8 a.m., and the office was packed with people waiting to see the PEO. There was quite a lot of chatter in the local language, and I was relieved when the secretary recognized me as I walked in. As I sat listening to the jovial banter in the room, I thought of what I would say to the PEO and reminded myself of the need to reiterate that the research outcomes would be made available to all the PEOs and the schools I would visit. My thoughts were interrupted when a Caucasian man walked in and asked if he could see the PEO. The conversations in the room stopped for a few seconds, but then they continued in a more formal manner in English. This was not entirely surprising, as I had witnessed similar reactions in some offices by indigenous Zambians when a Caucasian walked into the office. This also echoed my previous discussion on the legacies of colonialism, due to which speaking local languages is considered inappropriate in formal settings such as schools and offices. As I wondered why people had to change their demeanor in such a way, I realized from the conversation that the Caucasian man did not have an appointment but still would be able to see the PEO. Why would he be able to see the PEO? What was so significant about his business, when it appeared as though all the indigenous people in the room had made appointments? This encounter made me think about Kingsbury and Klak’s (2005) reflection on the construction of whiteness in the Caribbean and, by extension, about the
Zambian construction of whiteness and how it influences how knowledge is acquired and produced (in Mullings, 2005, p.276). Whiteness or being a Caucasian in Zambia are still associated with wealth, power, competence and authority, and these attributes are usually a key ingredient to gaining access to the geographic spaces most closely connected to the accumulation of international capital and political power (in Mullings, 2005, p.276). I ended up waiting more than 30 minutes for my turn to meet the PEO. When my time did come, the PEO was heading out and asked me what I wanted. In mid-sentence of my reply, he told me to see the deputy PEO. The deputy was very accommodating and asked me to return the next day, when a letter would be provided authorizing me to enter schools in Lusaka Province.

The morning of October 21, I was given my letter and introduced to the provincial SESO who would be my contact for my research in Lusaka Province. The SESO provided me with a list of all physical education teachers in the province and shared with me a circular from February 2009 requiring sports committees at schools to be proactive and not leave the work of administering physical education and sports to sports masters. The provincial SESO shared this circular to demonstrate that the decree ensured that physical education and sport were being taught and practiced in schools. The SESO also shared a March 2005 circular with me to demonstrate how earlier efforts (in the absence of a decree) had not made a significant difference.

My discussion with the SESO focused on the need to have broad representation of the schools in the province, in particular having all four districts covered. The SESO felt this would make the final report “rich”. The more we discussed the realities of conducting the research (interviews and classroom observations), the more it became apparent to me that conducting research in the other three provinces would not be feasible with the ongoing fuel crisis in the country. The SESO further identified teachers who, in the ministry’s opinion, would be able to provide good feedback and who had received training from the University of Zambia. I made the decision not to include these teachers except for ones who had a long history of involvement in the Physical Educational Teachers Association of Zambia (PETAZ).

The SESO shared the office with another officer. Towards the end of our conversation, the SESO made a remark about the 2006 workshop, which caught the
attention of the other officer. That officer had attended the workshop and asked if I knew the first scholarship winner, who had been announced at the workshop. The conversation focused on the scholarship, the difference it was making and on whether I could provide both officers with information on short courses in physical education that addressed how to inspect physical education classes. I responded by saying that I did not know of a place that offered such courses but suggested that they contact the Ontario Physical and Health Education Association (OPHEA) for resources. Remembering the British Council/International Inspiration workshop on physical education that I had attended earlier in the year, I asked if they had been involved. They both remarked on the difficulty of being recognized for such a project and for participating.

Unsurprisingly, the conversation turned to how long I had been away from Zambia, whether my family lived with me in Toronto and if I was married to a Caucasian. The question about whom I was married to presented an ethical dilemma, as I felt that this information was rather private and not worth sharing. I struggled with this particular question because I am married to a Caucasian, and interracial marriages are yet to be widely accepted in Zambian society. More often than not, in fact, they tend to be frowned upon. I thought of ways to refocus our conversation on the decree, perhaps in the process telling them what would be most acceptable to them. I did not know how best to respond to this question. I knew that if I responded by saying that I was not married to a Caucasian, this issue would pass and we would move on to another topic. However, I tried to think of the ethical implications and about whether I was being true to my theoretical underpinnings. Telling them who I had married would have met my obligation to be forthright and truthful with my research participants. But it also could have furthered the perception of me as someone who is lost (an outsider) at a time when I really needed to be thought of as someone that understood the community (an insider). In the end, I told them the truth. This inevitably brought up questions about whether I had intentions of ever returning to Zambia. This conversation continued for more than 20 minutes as I tried to assure them that my dedication to and interest in Zambia remained significant and dear to me.

In writing about the pre-research inception phase, my intention in focusing on the bureaucracy and associated challenges in obtaining permission is not to condemn or
criticize; rather, I am interested in highlighting the organizational culture that ultimately supports the Presidential Decree, and how I was offered a window into that culture. It is also a way to emphasize some of the issues related to gaining access to participants and community gatekeepers that one constantly has to negotiate throughout the research process.

### 3.3.1.2 School and Participant Recruitment

With well over a month spent trying to secure revised letters of authorization and dealing with the ongoing fuel crisis, I made the decision to focus on one province and to strive for depth in my interviews and observations. Throughout, I remained cognizant of the oft-mentioned need to circulate research outcomes with the Ministry of Education.

Purposeful sampling was used with the selection criteria of schools and teachers motivated by geographic location (representation from each of the four districts) and setting (rural/urban), type of school (basic, high, college), function (teacher/administrator) and gender. The final list of schools chosen can be found in Appendix C. Both the ministry and the provincial SESO significantly informed the design and the manner in which the research was conducted.

Teachers were a primary focus. I intended to start with the most experienced ones as a way to test my questions and to develop a context of the history of physical education in Zambia, which I could refer to, if needed, as a way of furthering my perceived credibility and insider status. Teachers, echoing Elmore (1979), are the group of participants in the complex policy delivery system who are closest to the challenges of implementing the Presidential Decree. The selection of candidates was also motivated by trying to maintain gender balance, so that seven of the subjects were female. In recent years, Zambia has had a preponderance of male teachers in rural areas, as recently qualified young female teachers have been reluctant to move there. Prior to my research, I anticipated that this would be no different in the case of physical education. Three of the female teachers I interviewed hailed from rural settings. Further, with respect to the objectives of this study, there was no reason to believe that ultimately the implementation of the Presidential Decree would be influenced by gender, although contextual nuances might highlight areas for attention with respect to gender.
Given the relatively small physical education community in Zambia, regional representation was relatively more important than the actual number of participants interviewed. This is why I ensured representation from all four education districts of Lusaka Province. I was also motivated to conduct interviews with participants in schools that I had not previously visited in any professional capacity.

Potential participants were informed that they need not have attended the 2006 workshop at which the Presidential Decree was mandated to participate in the research. I reiterated my willingness to conduct interviews outside their work and after hours if this worked best for the participants. They were given the opportunity to decline the interview and, if interested, they were invited to sign a consent form (Appendix D). As noted earlier, I subsequently interviewed seventeen individuals. Figure 3.2.1.2 provides a summary of the 17 interviewees conducted. As noted earlier, teachers were the primary focus and I opted to start with the most senior teachers, which in this particular case had more than 20 years of teaching experience. Physical education is a requirement in the Zambia Teacher Training course, meaning that the research participants included in the study have been trained in physical education. Some participants also held roles as Head of Sports in their schools. Participants were quick to share their love for sport and physical education, but I did not seek information about their involvement in sport and physical education prior to teaching college. One participant shared their involvement in competitive sports, which subsequently led to a scholarship in Cuba.

**Figure 3.2.1.2 Summary of Interview Participants**

<table>
<thead>
<tr>
<th>Interview</th>
<th>Rural/Urban</th>
<th>Institution</th>
<th>Interview Location</th>
<th>Position</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Urban</td>
<td>University</td>
<td>Participant Home</td>
<td>Lecturer</td>
<td>M</td>
</tr>
<tr>
<td>B</td>
<td>Urban</td>
<td>High</td>
<td>Classroom/school</td>
<td>Senior Teacher</td>
<td>M</td>
</tr>
<tr>
<td>C</td>
<td>Urban</td>
<td>Special Needs Training College</td>
<td>Office</td>
<td>Lecturer/Head of Department</td>
<td>M</td>
</tr>
<tr>
<td>D</td>
<td>Peri-Urban</td>
<td>Basic</td>
<td>Classroom</td>
<td>Teacher/Head of Sports</td>
<td>M</td>
</tr>
<tr>
<td>E</td>
<td>Peri-Urban</td>
<td>High</td>
<td>Classroom</td>
<td>Teacher/Head of Sports</td>
<td>F</td>
</tr>
<tr>
<td>F</td>
<td>Peri-Urban</td>
<td>Basic</td>
<td>Classroom</td>
<td>Teacher</td>
<td>F</td>
</tr>
<tr>
<td>G</td>
<td>Peri-Urban</td>
<td>Basic</td>
<td>Classroom</td>
<td>Teacher</td>
<td>M</td>
</tr>
<tr>
<td>H</td>
<td>Urban</td>
<td>Basic</td>
<td>Office</td>
<td>Teacher/Head of</td>
<td>M</td>
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</table>

### 3.3.1.3 Interview Guide

An interview guide developed in consultation with the gatekeepers and shared with the ministry during the pre-research phase invited respondents to share their experience in education. The interview guide contained questions regarding participants’ understanding of the goals of the decree, the relevance of the decree to their school or department, the individual they considered significant for them to be successful in their work and what they considered a successful lesson in physical education with respect to HIV/AIDS. In the research interview, the acquisition of knowledge is the focus (Kvale and Brinkmann, 2008). This knowledge is central to meeting the objectives of this study.

The semi-structured interviews ranged in length between 40 and 90 minutes and were all digitally recorded. Each interview began with the general question: “Can you tell me about your experience in education and your current position?” Other questions included: “In your opinion, are there any other measures apart from the decree that the ministry could have used to achieve the same goals of the decree?” and “How is the Presidential Decree important for your school/department?”.

<table>
<thead>
<tr>
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<th>Department</th>
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</thead>
<tbody>
<tr>
<td>I</td>
<td>Urban</td>
<td>Basic</td>
</tr>
<tr>
<td>J</td>
<td>Rural</td>
<td>High</td>
</tr>
<tr>
<td>K</td>
<td>Urban</td>
<td>Basic – All Girls</td>
</tr>
<tr>
<td>L</td>
<td>Rural</td>
<td>Basic</td>
</tr>
<tr>
<td>M</td>
<td>Urban</td>
<td>Basic</td>
</tr>
<tr>
<td>N</td>
<td>Urban</td>
<td>High</td>
</tr>
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<td>Urban</td>
<td>Curriculum Centre</td>
</tr>
<tr>
<td>P</td>
<td>Rural</td>
<td>Basic</td>
</tr>
<tr>
<td>Q</td>
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The following are the interview questions that inform this research study:

1. **Teacher/Administrator Experience**
   1.1 Can you tell me about your experience in education and your current position?
   1.2 Have you attended any workshops/trainings on the use of sport and traditional games for HIV/AIDS prevention?

2. **Development, Announcement and Promulgation of Presidential Decree**
   2.1 When did you find out about the Presidential Decree on physical education?
   2.2 Can you tell me what you understand the goals of the Presidential Decree to be?
   2.3 How, if at all, have you changed the way you teach physical education as a result?
   2.4 Can you share with me what kind of support, if any, you have received to implement the decree?
   2.5 How is the Presidential Decree important for your school and for your students?

3. **Contribution of Presidential Decree and Physical Education to HIV/AIDS, Gender and Social Development**
   3.1 Can you share with me any experiences you have of physical education and traditional games addressing the important issues for your school and students that you mention?
   3.2 Can you share with me some gender-specific challenges and opportunities within your school/community?
   3.3 Can you share with me some gender-specific experiences of how the decree may have addressed these challenges and opportunities within your school/community?
   3.4 In what ways, if at all, has the teaching of physical education as a preventive education about HIV/AIDS been problematic?
   3.5 How would you describe a successful lesson in physical education and traditional games with respect to HIV/AIDS?
3.6. Can you tell me about student engagement in your class?

4. State Education Sector

4.1 In your school, what factors/issues allow for you to have a successful lesson in physical education and traditional games about HIV/AIDS prevention?

4.2 Which individual (from the school to headquarters) do you consider significant for you to be successful in teaching physical education and traditional games about HIV/AIDS prevention?

4.3 How would you describe the teaching environment in your school?

4.4 Can you tell me about any involvement with your local community with regards to the teaching of games and HIV/AIDS?

4.5 Can you tell me about your interaction with the provincial education office with regards to the teaching of physical education and traditional games and HIV/AIDS prevention?

4.6 How can the provincial education office and the ministry ensure that you regularly have a successful lesson?

Following each interview and the meetings I held with school administrators and Ministry of Education staff, I made notes on my personal reflections on the interview or on interactions and observations about other pertinent events during the day, as well as on any early analytic thoughts I had about these experiences. These notes were a continuation of my methodological log and reflexivity.

I commenced my interviews in Lusaka and interviewed the most experienced physical education teachers (as recommended by the SESOs, as well as by those I knew from my work experience in Zambia). Each of these teachers had at least 40 years of teaching experience. Given the relatively small and young physical education community, such long experience is rare, particularly as Zambian teachers specialize in two subjects, with physical education being a subordinate subject in the teacher’s professional development. These initial interviews enabled me to modify the questions and to allow for greater ‘richness’ of the data I collected. The interviews asked respondents to share their understanding of the following: the goals of the decree, the
impact the decree was having on their teaching of physical education, the response of students, challenges and successes encountered in implementation and how games were being utilized in the fight against HIV/AIDS. The analysis of the interviews consisted of thematic analysis as described by Braun and Clarke (2006). I also recorded field notes with personal reflections on the interview and with emergent analytic thoughts.

My first challenge was gaining access to a school that serves the military community and is situated on an army base. My interview was scheduled for 10 a.m. on October 25, 2009, and when I arrived at the main gates, I was asked to provide identification. I spoke in the local language and produced my Canadian driver’s license. The soldier at the gate informed me that this piece of identification was unacceptable and that I had to produce a Zambian national registration card. I was aware of the need to show the national identity card when visiting the offices and residences on the base. However, I had forgotten to carry it because I rarely used it and thought I would not need it as I was visiting the school, rather than the military offices. My inability to produce my national registration card or to recall the number on the ID raised suspicion on the part of the soldier. His assumption that all Zambians carry national cards or at the minimum are able to recall their number was challenged and somewhat unraveled as I was conversing in the local language with him. He questioned how it was possible for a Zambian to not have the registration card or to recall the number. This became a protracted conversation that lasted more than 30 minutes, and at some point I was told I would be arrested, as the soldier did not believe the person I was scheduled to meet existed at the school. Scared of arrest and frustrated by my failure to convince him that I had a legitimate meeting, I left the gate and parked on the side of the road to call the research participant. I suggested that we make alternative plans to meet. The participant could not understand why the soldier had not let me in and suggested I reiterate that I was a Zambian and had a meeting at the school. I tried to remain calm as I shared the events of the past 30 minutes, while the participant insisted that I go back to the gate. In the end, the participant drove to the gate and convinced the guard to let me in. Our meeting started after 11 a.m. Reflecting on the day’s experiences, the exchanges with the soldier and with the participant reinforced some of the challenges the researcher faces upon returning to his or her home country. I felt I could have better prepared myself by carrying my registration card or my passport,
and I remembered to carry it throughout the rest of my time in Zambia.

After my first two interviews, I revised the script (Appendix F), which I used when introducing myself and my research to potential candidates. The changes were practical in nature as I found the script to be lengthy (and repetitive), and it created a rather uncomfortable atmosphere between the participant and myself. The interaction felt very formal and did not set a tone that I believed would elicit rich feedback on nuances and potentially contentious issues. Initially, I had planned to use the script on the phone, but some participants were in areas with poor cell phone coverage. I found the use of phones to be costly and realized that I could not judge potential participant reactions on the phone. As a result, I decided to make brief calls to potential participants, informing them that I would be in the area doing research and asking if they would be willing to meet me. During our face-to-face meetings, I would then introduce my research and ask for their consent. I remembered the advice about respecting protocol and always introduced myself to the head of the school prior to meeting the teachers. Upon reflection, the poor phone coverage proved beneficial to my research, as it allowed me to meet with potential participants at least twice in most cases, as I would travel to introduce myself and then schedule a subsequent appointment for the interview. On the second visit, I found I could reference issues discussed during our initial meeting. This created a less formal atmosphere, as we could discuss the school’s preparation for the exams, the ongoing fuel crisis and other current events in a collegial manner. I ended up conducting 17 interviews, several of which raised issues that I needed to resolve and thus helped me refine my interview guide and methods.

3.3.1.4 Classroom Observations and Schedule of Interviews

During my first interview, it became apparent that conducting classroom observations would be difficult and very disruptive to the school schedule, as late October/early November is the examination period, a time when most classroom instruction is focused on preparing students for exams. During the interview itself, I was fortunate to be with my research participant for a two-hour period, as the teacher had a break in his or her schedule when mock exams took place. The second interview was conducted on a Sunday at the participant’s home. This experience further reinforced the need to be flexible, as some participants would not be able to dedicate this amount of time, and I had
to consider conducting the interviews on the weekends as well.

I did consider extending my stay in Zambia until the start of the school year in January to allow for classroom observations. Yet the observations did not constitute the primary data source, and the unbudgeted costs for extending my stay led me to consider the observations as an extra data source that I would pursue if the opportunity presented itself. In the end, participants working in schools were mostly reluctant to comment on classroom observations, and I did not pursue them further.

My initial research methodology employed sequenced interviews in the manner described by Elmore (1979) with regards to backward mapping, such that each successive round of interviews moves a step up in the policy process, eventually leading to the central policy formulation level or the Curriculum Development Office. This enabled an analysis of effects on target behaviour at each level of the implementation process. It also enabled an analysis of what resources were required for that effect to occur. However, the realities on the ground, in particular the need to interview a majority of teachers in the first round to appropriately determine the key individual in the next higher level, as well as the ongoing examinations and limited time available, led me to adopt an abridged version of Elmore’s (1979) backward mapping.

3.3.1.5 Settings
The contrast in administration between the rural and urban schools was not significant, although the rural setting tended to be much more formal and hierarchical. The power and influence of the head master or mistress were much more apparent in this setting. It appeared that the rural setting had more opportunities for physical activities, given relatively large playgrounds. By contrast, in urban settings, one participant informed me, the school’s limited use of the playground almost led to the soccer field being demarcated and sold as individual plots for housing construction. This information came in response to a question about which factors in the school contributed to a successful physical education, which in this case were the playgrounds. The pressure to conform to gender norms was more significant in rural settings. In describing the challenges faced when implementing the decree, participants noted the uncommon sight of females engaging in physical activity and the associated community condemnation.
3.2.1.6 Teacher Openness and Interactions with Principals/Heads of Schools

I found all participants very open in discussing their experiences and views on the Presidential Decree. They were quick to point out the challenges they faced, but they were generally enthusiastic about the work they did and about their role in ensuring the decree’s implementation. With the exception of the two most senior teachers, however, participants did not offer critical commentary on authority. While I did not expect participants to be critical of administrators and higher authorities, I noted the contradiction between participants emphasizing the school administration’s and inspectors’ support and their admittance that they struggled to convince school administrators of the need for resources (time-tableing of subject, equipment). For me it suggested an area of further study, as this apparent disconnect spoke to the power dynamics between individuals in the education sector. I suspected this also had something to do with a culture that does not lend itself to an open critique of authority, particularly to someone (me) whom they may perceive as likely to raise their critique with those in authority.

I appreciated the invaluable advice of the SESOs and the gatekeepers regarding the need to seek permission of the heads of schools before meeting participants. These encounters were very formal and offered an interesting view of the administration in the school and of how it supported physical education. The significance of the head of school cannot be underestimated. My previous experience had already led me to think that this was the case; however, this notion had been based on an encounter with a very supportive head. One encounter with a deputy head stands out. The individual appeared uncomfortable with my research focus (physical education in their school) but seemed ready to talk about examinations and about how the school was doing in general. Towards the end of our five-minute conversation, the individual informed me that physical education was “dead” in their school. I was taken aback by this statement and left unsure about what to say. I responded that it was a challenge to implement subjects in the current economic climate and thanked the deputy for meeting with me and granting me permission to come back for an interview. Later that day, I reflected on what I would find out at the school and whether I should proceed with the interview, given that physical education was supposedly dead. In the end I was glad I went ahead with the
interview, as I met probably the most enthusiastic and passionate participant of the 17 I interviewed. The participant spoke about the ongoing efforts to “win over” the administration and about the community backlash to making girls participate in physical activity. Based in a rural community, the participant shared the experience of facing backlash from parents and the local community for teaching and encouraging girls to participate in physical education classes. In protest, parents demanded to meet with the head of school and teachers. While administrative support for the teacher was not strong, the teacher’s insistence and reference to the decree proved helpful in getting parents to grudgingly accept that physical education would be taught to their children. Throughout our discussions, the participant remained guarded in the responses on the school administration. This interview also stood out as it reinforced the need to focus on the support network that participants had when implementing the decree. The participant’s support network had essentially taken over the role of the SESO, who is charged with ensuring the quality of education instruction and is the education bureaucracy’s identified key support to teachers. This interview was particularly insightful in relation to how a school has influence in constructing, critiquing and mediating an education policy, particularly how schools exercise discretion in response to policies.

3.3.1.7 Ethical Challenges and Dilemmas

The researcher has an obligation to respect the rights, needs, values and desires of the participants (Miller, 1992). The methods of inquiry I adopted held the potential of disturbing and invading the ‘natural’ day-to-day experiences of participants. To protect their rights, I undertook the following:

1. Shared research objectives with participants both verbally and in writing to ensure comprehensive understanding;
2. Sought written permission from participants, the Provincial Education Office and the Ministry of Education, acknowledging consent to proceed with research as described;
3. Informed research participants of all data-collection devices and activities;
4. Offered to make verbatim transcriptions and written interpretations and reports available to the participants;
5. Emphasized that participants’ rights, interests and wishes would be considered first when choices were made in reporting the data;
6. Ensured that the final decision regarding informant anonymity would rest with the participant;
7. Conducted a follow-up visit (in August 2011) to share initial findings and to solicit feedback, particularly around issues of the participants’ voice and representation in the research findings.

As a critical theorist and a reflexive researcher, I was concerned about how to manage potential power imbalances between participants and myself. England’s (1994) caution that only being sensitive and aware of power imbalances is not sufficient, as it does not alter the power structure, is relevant here. I was concerned that this stage give voice to participants and that it did not place them at risk should they disagree with the administration or with particular school policies. Earlier I noted the steps I took to ameliorate power imbalances by creating an environment aimed at understanding what had been happening since the decree, in the process allowing participants to share their experiences.

Kvale (2006) stresses that a conception of research interviews as personal, egalitarian dialogues masks the power asymmetry of hierarchical interview relationships. In a methodological context, close analyses of the specific power dynamics within different forms of interviews are warranted (Kvale, 2006, p.496). To address this concern, Kvale (2006) suggests making the power play between researcher and participant transparent by the presentation of the method of an investigation, so that readers may ascertain the potential effects of the power play on the knowledge, and participants know of their ability to stop the interview at any time. I have alluded to this idea in my discussion of positionality and power.

England’s (1994) assertion of the need for researchers to acknowledge the inherently hierarchical researcher-researched relationship (p.86) meant, for me, a recognition of how my previous work could foster a hierarchical relationship between researcher and participant. Prior to the research inception, I wrestled with how to address participants who potentially recognized me from my work with the University of
Toronto. My particular concern was that individuals might assume that participating in
the interview would lead to a favourable consideration for the University of Toronto
scholarship. During my initial meeting with the provincial SESO I was asked about the
scholarship, if it was still running and how the University of Toronto determined the
person selected. This calmed my fears. I was able to respond that the determination of the
individual was the responsibility of the University of Zambia. One of the more
unexpected encounters, however, occurred when I asked a participant during an
interview, “Who do you consider the most significant person in your work?” The
participant responded that I was the most significant person and, after a pause, mentioned
other individuals. The participant recognized me from one of the workshops that she had
attended and that I had contributed to. This response was unsettling, as I was not certain
what this meant but thought it gave too much recognition to me as an outsider. In a
separate interview in which another participant recognized me, I found it equally
unsettling that the individual constantly referred to their personal situation of being a
single parent struggling to support the family.

3.3.1.8 Data Analysis

Each interview was transcribed verbatim, with thematic analysis used to guide the
analysis of the interview due to the approach’s theoretical flexibility and sound
methodology (Braun and Clarke, 2006). Thematic analysis focuses on identifiable themes
and patterns of living and/or behaviour (Aronson, 1994). This analysis was pertinent to
the present study, as an understanding of the specific behaviour at the lowest levels of
implementation that generates the need for policy was central to backward mapping and
the objectives of this study (Elmore, 1979). A critical lens was adopted in analyzing the
themes that emerged.

Transcripts were studied for emergent themes, and patterns of experiences were
identified, including direct quotes or the paraphrasing of common ideas. Data as they
related to patterns were identified, combined and catalogued to also include subthemes.
Themes are defined as units derived from patterns such as “conversation topics,
vocabulary, recurring activities, meanings, feelings, or folk sayings and proverbs”
(Taylor and Bogdan, 1989, p.131, in Aronson, 1994). Themes are identified by “bringing
together components or fragments of ideas or experiences, which often are meaningless
when viewed alone” (Leininger, 1985, p. 60, in Aronson, 1994). Using this literature, I am able to make an argument for why the chosen themes are relevant for the study. Once the themes were collected and the literature studied, I proceeded to formulate theme statements to develop a concept of how behaviour at the lowest levels of implementation generates the need for policy.

While interviews were the primary data source, another unexpected one was the process of designing the research method and methodology. Qualitative research often identifies the methods and methodology as tools at the disposal of the researcher to utilize when investigating social phenomena. Researchers develop and test their methods before moving to the data-gathering and results phases of the research. In determining my methods, I was able to gather data about my research subject with regard to the social and political environment that the Presidential Decree and research participants operated in. The experience of designing my methods and methodology contextualized the data I gathered through interviews. These experiences can inform the scholarship on research methodology in education settings in the global South. Prior to traveling to Zambia, I believed I had the necessary skills and experience to ground my research design within the Zambian cultural context. I also believed that I would be able to commence my study in a relatively short period of time. However, even as someone knowledgeable about the Zambian educational system (and with a support network of gatekeepers), I found the process frustrating, challenging and emotionally draining. Trying to overcome these emotions took a long time—well beyond my return to Canada. In many ways, overcoming these emotions affected the commitment I had made to participants and individuals to return within a year to share my findings. The process of conducting research can be a lonely experience, and when combined with day-to-day challenges (e.g., waiting at gas stations, the threat of arrest), it can lead to bias in the design of methods and, subsequently, in the data gathered. My emotional political economy became an integral part of the research design, and through reflexivity it informed how I arrived at the decisions I made, as well as my analysis of the data.

3.2.1.9 Limitations of the Study
The use of literature drawn from non-African and, in particular, from non-Zambian settings could be perceived as inhibiting the possibility of developing a richer
understanding of educational policy enactment in Zambia. This is partially ameliorated by my experience of working with the Ministry of Education and by my regular consultation with gatekeepers, from the pre-research to the data-analysis stages.

Given Giulianotti’s (2004) concern about cross-cultural politics and potential neocolonial repositioning within sport for development, as a Zambian educated in Canada and the United Kingdom, I may be perceived as influenced by Western culture and as having expectations of similar education provision, with no real appreciation of the Zambian educational context. As discussed, the notion of transnational power is particularly important to highlight as it relates to my interaction with participants. Recognition of the existence of this power imbalance is an important first step, and I outline several measures to ameliorate this. Ultimately, however, the perspectives and analysis, while substantially informed by my participants, are formed by my personal experiences and background. I pay attention to this and aim to avoid essentializing my role in the research.
Chapter Four:  
Development, Promulgation and Understanding of Goals

4.1 Introduction

While the majority of interventions in sport for development are led by NGOs, Zambia, with assistance from the London 2012 International Inspiration program and the British Council, is one of the few countries revitalizing its state-led physical education curricula to incorporate aspects of sport for development and to address broader education targets. This revitalization has resulted in physical education becoming examinable at the Grade 7 level as of 2009. As commentators have noted, the inclusion of sport in Zambia’s Fifth National Development Plan aims to stimulate education, highlight health awareness campaigns and encourage participation in sport. Sport’s inclusion in national development plans in places like Zambia is perhaps a sign of the growing awareness of its potential to contribute to national development and to serve as an avenue to meet development goals.

The burgeoning sport for development movement stands to benefit from the experiences of Zambia in attempting to use the decree to address educational goals. In this regard, the development and promulgation of the decree are important starting points when revealing not only the outcomes of the research undertaken but also the lessons for sport for development at a national level. This is in part due to the need for more evidence that can inform the broader development sector. The context in which the decree was developed can highlight which factors can help any decree realize sport for development objectives (or not) and allows stakeholders to determine their effectiveness and feasibility.

Specific to this study, the themes of the development and promulgation of the decree are important because they enable an examination of the desired policy objectives against outcomes and of the extent to which the outcomes were intended or not. It is also helpful that all participants could speak relatively easily on these themes, with the answers not being overly school or participant specific. This was due to participants being able to speak to how they learnt about the decree, why they thought it was developed and what they thought its goals were. As a starting point, these themes therefore highlight the individual and how he or she negotiates his or her response to the
decree, as noted by McLaughlin (1987). Additionally, I am much more implicated in this outcome than others due to my previous experience of working in Zambia. In this regard, research participants and I could relate much more to questions about how they found out about the decree and its objectives, which was not so much the case with individual factors that contributed to a successful lesson on physical education and HIV/AIDS, particularly as I do not have a background in physical education as a teacher. These themes are also closely related to, and inform, the literature on education policy development and implementation reviewed in chapter 2. The research findings from these themes certainly challenge the oft-presented ‘neat and tidy process’ of policy making.

In keeping with my chosen critical methodology, and with reflexive accounting in particular (as discussed in chapter 3), it is equally important that I outline how I myself came to learn about the decree and my own reactions to it. I do this by reflecting on my personal journey in physical education and in sport for development. Seminal to my outlook on Zambian physical education and on the decree on physical education were my experiences at the first conference I attended on sport for development in 2005. My reactions and experiences from the workshop mark the beginnings of my involvement in the development and promulgation of the 2006 decree.

4.2 Development of Presidential Decree

The decree on mandatory physical education was first pronounced at the Next Step Workshop on Sport for Development in Livingstone in June 2005. This conference was organized by the Sports Council of Zambia and the Norwegian Olympic and Paralympic Committee and Confederation of Sports (NIF). I regard this as my formal introduction to the sport for development movement. I met academics and practitioners from around the world—England, India, Kenya, Norway, Tanzania, and South Africa—who were working on diverse projects. Attendance at the conference marked my second visit to Zambia as part of my work as the HIV/AIDS program coordinator at the University of Toronto. My first visit had occurred a year earlier. The conference stood out for, among other things, the diverse speakers, the clear (or obvious) divide between participants from the global North and the global South, the impression that sport for development was being given to the global South by the global North and the less than adequate management of registration and accommodation.
While international government agencies were present (including the UK Minister of Sport and Culture), most of the projects highlighted were run by NGOs and supported by government donor aid agencies. At the opening ceremonies, the Zambian President Mwana Musa spoke at length about how he would advocate for London’s bid for the 2012 Olympics. As I sat in the audience trying to figure out how this was relevant to the theme of the workshop and wondering whether the president would acknowledge some Zambian sport for development NGOs, he began speaking of the ailing sport conditions (mostly football) in the country and how sport could contribute to the country’s efforts to address the HIV/AIDS epidemic. He noted that the opportunities sport provided in this regard had led him and his administration to declare physical education compulsory in all schools. Meire and Saveedra (2009) point out that “President Levy Mwanawasa promised in his opening remarks that henceforth physical education classes would be made mandatory for all schoolchildren nationwide” (p.1161). Their article focuses on female role models in sport for development in Zambia. They argue that this statement was a way of contextualizing how limited access to education restricts sporting opportunities for women and girls. For me as an attendee, however, the response of the audience, especially the rapturous reaction among teachers and representatives of local NGOs, was as important as the president’s statement. Being new to the sector, I did not fully appreciate the significance of this statement, as it appeared that this was merely part of a lengthy speech that had so far focused much more on the 2012 London bid than on Zambian sport for development efforts.

I acknowledge that the above is an abridged version of the events at the conference. Significant in the above are my limited understanding at the time of the status of physical education in the country and the geopolitical implications of the president’s speech. Why would participants respond so vociferously to physical education being compulsory when it should be taught like any other subject in all schools? What in particular was significant about making the subject compulsory, and what would that resolve? Why was this announcement being made at this particular time? Most of the information presented at the workshop focused on NGO projects, so why not issue a mandate for that sector? Should not teachers be teaching physical education anyway? Given the various national development agencies represented, why focus on the UK and
its London 2012 bid when the NIF was an official partner and had supported the establishment of the Unit of Physical Education at the University of Zambia? Would Zambia receive anything for its unflinching support for the London bid? Was the decree made to appease donors and to suggest a government committed to sport, given the forum of a sport conference at which the president was speaking? In reflecting on my initial reactions, I consider them rather typical of someone not anchored in the contextual realities of delivering education in a developing country like Zambia. Because I did not understand the contextual issues, I focused on the irrelevant one of the president working into his speech the London Olympic bid, and I could not appreciate why participants were very excited about the decree. Additionally, by asking why teachers were not teaching the subject already anyway, my reaction resembled many critiques of the failing education sector that focus predominantly on the individual, without due consideration for the broader context influencing the outcome of teachers’ efforts. For example, my initial reaction did not question how the decree would be implemented across the country, the implications for the school settings (urban/rural), how supportive parents would be and why the bureaucracy was unable to ensure that physical education was being taught anyway.

If one draws on critical theory and postcolonial literature, the reaction of the participants to the announcement and the president’s support for London’s Olympic bid stand out. The reaction of the participants can be viewed as a victory and affirmation for a subject and community that had long been subjugated by others on the curriculum. The political and moral victory of having the country’s president attend a workshop, and the implications for physical education’s struggle for legitimacy and societal approval, cannot be underestimated. The decree can be seen as giving voice and representation to physical education, a subject traditionally excluded or underrepresented in meaningful policy planning for the education sector. The physical education community benefited from the declaration and thus saw itself empowered.

The geopolitics at play between Zambia and the UK at the workshop is worthy of reflection. Was the Zambian president being politically astute, having determined what Zambia would get in exchange for this support? The expectation of rewards for this kind of support is certainly not uncommon. Writing in the *Independent* newspaper in the run-
up to the selection of the 2010 Commonwealth Games host city, Hubbard (2003) is prescient of the cross-cultural politics at play in any mega sports event:

It is a fight between New Delhi, from the subcontinent which has never hosted them, and Hamilton, Ontario, from a nation which has held them four times. Britain must hope New Delhi is successful, as a vote for Hamilton would be seen by influential Afro-Asian members of the IOC as keeping the Games in the old white Commonwealth club, which has staged 15 out of 17. This would hardly induce their support for a London Olympics two years later. Geopolitics is now the name of the Games. (p.2)

From a postcolonial perspective, what is telling about the above quote, and indeed about the support offered by the Zambian president, is the idea that countries like Zambia, and by extension “Afro-Asian” members of the IOC, are able to negotiate the terms of their support and ameliorate the power imbalance between countries. This is not necessarily unique and may in fact lead to a repetition of mistakes made by precolonial African leaders who prioritized self-interest over the interests of the community or country, as Mukanga (2012, p.3) warns. It is not surprising that Zambia was chosen on the initial list of countries to receive support for the development of sport and physical education through the International Inspiration program, a program that was part of the London bid and sought to develop sport and physical education in several countries in the global South. In a sense, Zambia has benefited, but if indeed the president was able to negotiate benefits to Zambia for supporting the London bid, did Zambia get the best possible returns for this support? I partially address this issue in my final analysis of the impact of the Presidential Decree. However, considering the geopolitics and drawing on Giulianotti’s (2004) cautionary note about the move towards neocolonialism and an imbalance of power between donors and recipients within sport for development, it is my contention that the cross-cultural politics displayed at the workshop reinforced dependency, privileging knowledge and expertise from the global North at the expense of indigenous knowledge. My experiences at the 2005 workshop support Giulianotti’s (2004) concern for the complex dynamics of power and meaning behind cross-cultural ‘cooperation’ between donor and recipient groups.
4.2.1 Reaffirmation of Presidential Decree

In the months that followed the 2005 workshop, I learned a lot about Zambian physical education and about how the decree could lead to a revitalization of sport and physical education in the country. Much of this learning occurred in the context of the University of Zambia/University of Toronto partnership on HIV/AIDS capacity building for physical education teacher training. My discussions during this time took the form of face-to-face meetings, conference calls and e-mail exchanges with representatives from our two universities, with teachers and local sport for development NGOs. In particular, I learned from physical educators about the perceived low status of the subject within Zambian society and how this meant that it was not regarded a ‘serious’ subject when the school timetable was organized. The physical educators constantly referred to the need to have the subject examinable as the ultimate solution to lifting its fortunes. Throughout many of these discussions, the teachers spoke (in my opinion) as outsiders, locating themselves on the periphery of Zambian physical education with no foreseeable role in shaping the future of the subject.

The declaration of compulsory physical education did not receive much attention in our discussions of how we could further develop the partnership between the two universities. A recurring theme, though, was the need to have a workshop for physical educators on HIV/AIDS as a way of increasing the role sport and physical education could play in responding to HIV/AIDS in Zambia. I reacted with skepticism, as I believed (and still do) that too many workshops are conducted in countries of the global South, which in my opinion can be to the detriment of development objectives, as they can take key individuals away from their work. An editorial in Zambia’s Post newspaper titled “Wastefulness and Extravagance”, on the Zambian civil service, goes further by suggesting that workshops and seminars can be a leading cause of corruption in the country. The editorial further notes that “arranging for and attending workshops, seminars and conferences has become the only discernible preoccupation of most civil servants and public workers” (Post Editorial, 2011). Workshops in themselves are not bad for development, but when a large number of individuals are frequently at workshops rather than working, this has implications for development outcomes. I do understand, though, that in addition to building the capacity of individuals and organizations, workshops also
offer additional sources of revenue (through per diems and travel allowances) for many public sector workers and can supplement low wages and increase motivation. A challenge for our group, then, was to design a workshop that would be meaningful and different from other workshops that physical educators had attended.

Our ongoing discussions resulted in funding requests to the Ministry of Education, the Canadian International Development Agency (CIDA), the Commonwealth Games Canada (CGC) and the United Kingdom Department of Sport (UK Sport). Those present at these discussions felt it important to make a case for more training of physical educators on how to incorporate HIV/AIDS in their teaching and to position the 2006 workshop as a follow-up to the 2005 conference by physical educators (not the Ministry of Education) to potential funders in this way. This, it was believed, would demonstrate initiative and an empowered group of teachers keen on building on the outcomes of the 2005 conference. Participants in these discussions established a steering committee consisting of representatives from the two universities, the Curriculum Development Centre and from the EduSport Foundation.12

The international organizations committed financial support to the 2006 workshop prior to any response from the Ministry of Education, which in a way created an incentive for the latter to support the workshop, particularly as it was presented as a follow-up to the 2005 Sport for Development conference. The Ministry of Education agreed to support the workshop by instructing all schools to allow those invited to travel and also to provide their transportation costs. The workshop organizers committed to pay any participant costs at the workshop.

The local organizing committee insisted on inviting the president to the workshop, given that he had attended the workshop in 2005. The organizing committee believed the chances of his attendance were very limited but that it was worth taking the time to pursue this invitation. The organizers did not receive a formal confirmation of the president’s acceptance until a few weeks prior to the workshop, and the day he would

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12 The Education through Sport (EduSport) Foundation is a non-profit and indigenous Zambian sports non-governmental organization. Edusport is considered to have pioneered the use of sports to address social development challenges of youth unemployment and health awareness in socioeconomically underserved communities in Zambia. Central to the EduSport intervention methodology is the identification, training and support of young people who reach out through sport to their peers.
attend changed at the last minute. In the week leading up to the workshop, senior members of the local organizing committee were asked to contribute speaking points for the president’s speech. Seizing the opportunity, the organizers provided information on the deteriorating status of physical education in Zambian schools (likely censored in the final draft speech) and referred to the decree. At the workshop itself, the organizers selected a few participants to perform a skit for the president, government officials and donor representatives that not-so-subtly criticized the Ministry of Education for failing to promote the decree. The skit also sent a message that standards in physical education remained very poor. The performance may have led the president to be much more assertive in his speech than he had been the previous year.

For many in the physical education community, the president’s more assertive tone and his promise to dismiss the Minister of Education signified a watershed moment for Zambian physical education and sport. The president dedicated part of his speech to clarifying the government’s position on the salary of the national football team coach, which at the time was a contentious issue in the country. This led some of the workshop organizers to believe that the workshop may have afforded the government an opportunity to clarify its position on football and sport in the country. Nonetheless, the 2006 workshop is significant, as the decree was reaffirmed and the consequences for failure to implement the decree made explicit.

4.2.2 Response to Decree

The day after the president’s speech, the Ministry of Education issued a circular (Appendix G) that reiterated the president’s declaration, in which he had stated that the teaching of physical education is to ensure Physical Fitness of the learner and need not involve expensive equipment … additionally it need not necessarily be taught for examinations purposes only but should be taught for enhancement of values, skills and a holistic development of the learner. (emphasis added)

It is notable in the above declaration that more encompassing language about life skills and holistic development is used rather than HIV/AIDS-specific language, and that the role of equipment in teaching physical education is emphasized. One can also make the case that, as presented, the Ministry of Education was absolved of the responsibility of
ensuring the teaching of physical education, with a greater role assigned to teachers and schools.

The president’s more assertive tone may have led to a more urgent response by the ministry to inform schools about the need to ensure the subject’s teaching. Most of the participants I interviewed believed the decree to have been developed in 2006. Only one participant referred to the 2005 workshop and to the president’s declaration of compulsory physical education at the time. Two participants were uncertain of the specific time at which they learned of the decree. One participant suggested that they learned about it in 2003. The minister, perhaps as an act of self-preservation, certainly ensured the message’s dissemination at the highest levels of the education bureaucracy and, subsequently, to schools. The urgent response and the message contained in the circular indicated a directive that was light on details about how the ministry would support the education sector’s long-term goals, with much of the responsibility for implementation left to teachers and schools.

The responses of participants suggest that the 2006 decree is relatively more significant than the 2005 statement in the Zambian school setting, as most associated the commencement of compulsory physical education with 2006. Additionally, the decree resulted in a Ministry of Education ‘policy’ statement that legitimized the role of physical education on the school timetable. Missing from this circular, however, was any reference to a strategy for how teachers and schools could be supported in ensuring the “holistic development” of the learner. The ‘policy’ statement directs senior administrators to implement the teaching of physical education as contained in the syllabi and ensure its appearance on the timetable. What did the Ministry of Education envision, and how did it think to achieve its objective?

The events leading up to the 2005 and 2006 declarations suggest the absence of a neat and tidy policy development process. From the policy lifecycle referred to in chapter 2 and the response of participants, the first two stages of the policy lifecycle (priorities and objectives, and research and analysis) would appear to have been undertaken with no discernible implementation strategy beyond the directive to teach physical education.

Without a detailed strategy, the significance of the decree may be undermined, as it is subject to interpretation. The rush to demonstrate to the president, or perhaps to save
the jobs of senior management at the Ministry of Education, may have led to a missed opportunity to develop an articulated strategy plan enabling teachers and schools to learn how to use inexpensive equipment while allowing Zambian students to benefit from a quality physical education program that enhances values and skills and that leads to holistic development.

It could well be that the enthusiastic response by physical educators was misinterpreted, so that the need for long-term planning was deemed unnecessary. If a decree had been issued for a subject other than physical education, would a circular have been deemed sufficient? Of course, this depends on the reasons for the decree, but it seems that if behavioural change among teachers and schools was required, a strategy to articulate how the decree would be accomplished would be just as significant, particularly if administrators aimed to address conditions developed over a substantial period of time. McLaughlin’s (1987) call for a strategic balance of pressure (e.g., decree and tone of president’s declaration) and support (e.g., teacher training and stakeholder engagement) for effective implementation is relevant here. The response of the Ministry of Education also suggests a limited appreciation of the complexity of ensuring a consistent and quality physical education program within Zambian schools. Physical education and sport mean more than instructing children how to use inexpensive equipment on playgrounds. Additionally, the Ministry of Education may simply have not been experienced at implementing decrees and thus did not have the necessary expertise to plan for such a strategy. This missing strategy has a bearing on the promulgation of the decree and, consequently, on how teachers and schools have come to understand its goals, which I address further in this chapter and throughout the remainder of this thesis.

One outcome of the 2006 workshop was the creation of the Physical Education Teachers Association of Zambia (PETAZ). Participants agreed to form chapters of PETAZ in all nine provinces to lend support to physical education teachers through the sharing of experiences and resources. Resources consisted mainly of lesson plans shared among participants at the 2006 workshop. Regardless of how technically sound these lesson plans are, they require experienced teachers who are able to combine elements of physical education and HIV/AIDS prevention in a manner that reinforces the core values of inclusion, developmental appropriateness and critical social skills. This is considerably
more challenging if the person charged with the sharing of these lesson plans has only attended one workshop and does not receive support from the government beyond money to conduct their own workshop in which they are the main facilitator.

In the year following the 2006 workshop, PETAZ was very active in the dissemination of lesson plans, but the excitement around the organization fizzled. Participants lamented its inability to play a more active role in recent years. At present the influence of PETAZ remains ad hoc at best and lacks strategic capacity to move Zambian physical education forward.

4.3 Promulgation

Promulgation can be understood as the act of making a decision or act widely known. Of interest here is how participants came to learn about the decree. Does it really matter through what medium one learns about a decree? The responses from participants suggest that the medium is worth considering and, importantly, they speak to the capacity and commitment of the education sector to physical education. How a policy or decision is made known to key stakeholders can shed light on the policy process within the educational sector and elucidate some of the objectives of the Ministry of Education with regards to physical education. How stakeholders come to learn of a decision or decree can in turn influence their understanding of the issue, their response and, ultimately, the success of the decree.

While 6 participants were present at the 2006 workshop and could benefit from their presence when the decree was pronounced, 11 participants learned of it via the radio or by word of mouth, and not through the official circular the Ministry of Education claimed to have sent to all schools and provincial education offices in the country. In fact, to date, most interviewees have not seen the circular and therefore teach on the assumption that there is a presidential decree to compulsorily teach physical education. This contrasts with the views of the SESO, who reiterated that the circular had been sent to all schools in the country and that therefore the decree was working. With this in mind, what the directive suggests should be taught or focused on remains unclear to many teachers. Thus, the decree is open to interpretation, as its message is received via myriad media. For example, responding to how and when they learned about the mandate, some of the responses by participants included the following:
In 2006, after the workshop, because I read it in the newspaper, and as for my school, they did not wait for the circular to come. They acted from the newspaper. The following week my head teacher called me to say there was a directive from the president that physical education should start. (Interviewee A)

Unfortunately, in Lusaka, even the PEO [Provincial Education Office] did not receive the circular, but I personally got that circular from ZAMISE [Zambia Institute for Special Education]. (Interviewee E)

The above comments suggest that decrees can have immediate impacts on behaviour or teaching practices with regards to mainstreaming physical education in development. However, this change needs to be carefully planned and managed, as the enthusiasm to implement shifts attention to the individual teacher, absolving administrators of their duties to ensure a systemically implemented mandate. At the very least, the results suggest that broad-based support for sport for development focused on HIV/AIDS prevention is still beholden to the structural context and limitations of educational policy implementation.

These limitations are such that approximately 100 participants attended the 2006 workshop; however, the remaining physical educators in the country learned about (or to this day learn about) how to incorporate HIV and other life skills into physical education lessons on an ad hoc basis. Training workshops can be useful in this regard; however, none of the research participants attended a workshop planned and organized by the Ministry of Education. Such a ministry-planned forum would have been useful for understanding some of the challenges teachers encounter in the delivery of compulsory physical education.

4.3.1 Reprimand and Status of Physical Education

Within the school context itself, the urgency embedded in the message of compulsory physical education has led to a fear among administrators and teachers of being sanctioned or reprimanded. The consequence of this for the teacher could be an unsupportive administration that overlooks one’s professional development opportunities, or worse, demotion or transfer to another school. For administrators, being reprimanded
could lead to a strained relationship between the school and the PEO, a relationship that would be unresponsive to the needs of the school and that singled out school administrators as incapable of carrying out the government’s mandate.

Indeed, fear was a recurring theme among all interviewees, and it appeared relatively more significant among teachers than among administrators. This fear plays a significant role in the inclusion of physical education on the school timetable as well as in the allocation of school resources (financial and administrative). It does not, however, necessarily lead to a belief in, or an understanding of, the applicability of physical education for HIV/AIDS prevention among senior administrators themselves. What remains is a reluctance to support and ensure the teaching of physical education, largely stemming from its (until late 2009) non-examinable status and the perception that studying physical education (and a focus on sports) limits one’s career opportunities.

This negative perception of physical education is not unique to Zambia; it is a widely held societal view in many regions of the world. For example, one can find parallels in Houlihan and Green’s (2006) review of debates on the role of physical education in Britain in the 1970s, when established education administrators and philosophers questioned the transferability of skills learned from movement and games. More recently, Hardman’s (2008) world survey on physical education (PE) in schools notes that all countries and states indicate that PE's status is perceived to be lower than that of other school subjects, with such a perception reported in 80% of African countries in the survey. Citing Ghana, Nigeria and South Africa as exemplars, Hardman (2008) provides the following cases as examples of this phenomenon:

**Ghana**

"Educational planners do not attach due importance to PE. The growing consensus is that subjects such as Mathematics, Science and English are of paramount importance in life. Hence they receive recognition at the expense of PE. The general misconception is that PE is a subject for the 'never-do-well'. The fact that PE is nonexaminable further demeans the subject in the eyes of students and staff". (Ammah and Kwaw, 2005, p.321)

A problem is "public misconceptions about the subject. The current senior secondary school program is heavily loaded and academically oriented. Pupils
thus tend to focus more on subjects other than PE. They know PE is non-examinable. The subject is thus downgraded in the eyes of students and other academic professionals”. (Ammah and Kwaw, 2005, p.315)

Nigeria

"PE is considered to be less important than other subjects, and (is) held in low esteem in school and society.... At universities, undergraduates taking PE are often treated with contempt, and held in low esteem by their contemporaries in other subject areas". (Salokun, 2005, p.503)

South Africa

"Low status-priority given to 'academic subjects'; the 'Life Skills' programme does not allow for active participation in secondary schools—treated as a non-subject and of nonacademic status". (PE Teacher, South Africa)

(Hardman, 2008, p. 12–14)

If the goal is recruiting more teachers and administrators, the coercive function of a decree can be useful. However, the relatively low standing of the subject among school administrators points to the poor articulation of its positive role in the national curriculum, particularly about how learned skills in physical education are applicable to other areas of life, including HIV/AIDS prevention. This leaves much of the work of HIV/AIDS prevention to physical educators themselves. To be sure, all Zambian teachers are expected to incorporate HIV/AIDS into their teaching. However, physical education teachers are unique in the sense that they also engage students physically through movement and games in learning about HIV/AIDS.

The majority of interviewees referred to the presidential decree in discussions with senior management as a means to ensure that time was not taken away from physical education, particularly during the examination periods when non-examination subjects are dropped to support examinable subjects. Clune’s (1989) work on curriculum policy in the school context is worthy of reflection here as it shows that policies (and decrees) are mediated, critiqued and constructed by schools. The response of Zambian administrators
in this regard suggests that different normative standards operate in schools and in the Ministry of Education. In delivering education and promoting awareness of HIV/AIDS, administrators may perceive that physical education inhibits rather than enhances values and the development of the student—a view that contrasts with the position taken in the policy decree. The direct implication of this is that HIV/AIDS prevention education is undermined by the marginalization of physical education. In turn, within these schools, the education sector is not using all the available resources at its disposal, particularly those demonstrated to more actively engage and support students. If one accepts that physical education can contribute, when appropriately implemented, to students’ improved academic performance, it follows that opportunities to attain key education targets are not being utilized.

Further, some interviewees indicated that they had not received training from the Ministry of Education on how to incorporate HIV/AIDS prevention into education. In these instances, individuals were left to their own devices to assess, interpret and determine an appropriate physical education HIV/AIDS lesson. Additionally, while individuals could access resources for travel to workshops, accessing necessary teaching materials such as books and plans remained a considerable challenge.

4.4 Understanding of Goals

Participants offered unique and contrasting responses to what they understood the goals of the decree to be. Their responses were at times very focused and narrow in assessing how the decree would impact a student, teacher or school. At the same time, participants offered broader perspectives on what the decree sought to achieve. There was an evident distinction between initial and later responses. As the interviews continued, most participants cited an alternative career (e.g., professional football player) at some point during the interview in reference to what they understood as the decree’s goal. These responses appeared to be almost embedded in the ethos of participants, in that they would refer to alternative careers in a way that suggested that it was a commonsense, uncontentious issue within the physical education community. These responses implied that the underlying goal was the preparation of athletes and sport leaders. Intriguingly, none of the participants made reference to HIV/AIDS prevention in their responses to the
decree’s goals, which is particularly interesting given the context in which it was
launched and given its objective of developing life skills.

Given the various media through which participants came to learn about the
decree, it is perhaps not surprising that participants provided divergent understandings of
its goals. Some participants linked the decree to the Millennium Development Goals
(MDGs), some suggested it meant a focus on better performance at sporting events. Some
linked the decree to an alternative career path for students, while for others, the
Presidential Decree was a way to enhance how one lived in the world. Participants’
comments illustrate these differences:

*The goal of the Presidential Decree was in line with the Millennium Development Goals
(MDGs).* (Interviewee A)

*Involvement in physical exercise will lead to a healthy nation and can lead to us excelling
in international sports.* (Interviewee G)

*In order to have a nation/society that is fit and not only dependent on books… one can
also make a living through other activities.* (Interviewee J)

*Maybe they looked at the performance of ball games, the way they are being played, our
national team losing.* (Interviewee N)

*The president emphasized that all of us need physical exercises so that we keep healthy…
and develop skills that will be useful in terms of living in this world.* (Interviewee D)

*The president decreed physical education because when a person is not doing exercise
they bring evil things in their mind… when they are active evil things cannot come into
their mind.* (Interviewee B)

These responses illustrate not only differing but also limited understandings of both the
decree and the cultural and social importance and role of sport in development, reminding
us, at the least, that successful sport approaches to SDP do not follow directly from top-
down initiatives. The responses support McLaughlin’s (1987) assertion that policy cannot always mandate outcomes at the local level.

Divergent views can raise concerns about how messages have been interpreted across the sector. On the other hand, understanding does not necessarily suggest that the process of promulgating a policy has worked and may, in fact, lead to reinforcing a particular viewpoint not consistent with the goals of the decree. How participants have come to understand the use of physical education and games in HIV/AIDS prevention is a case in point, as the urgency associated with the decree often led to the disease being overlooked in favour of modest correlations between games/activities and the message of prevention. These modest correlations mean that teachers often do not make deeper connections to the key issues of gender and poverty when addressing HIV/AIDS. This results in critical pieces in the HIV/AIDS prevention puzzle being missed. I address this issue in chapter 5. Of relevance here is how HIV/AIDS prevention through sport and physical education has come to be understood as not complex. Drawing on the didactic and behaviour change model, students are asked repetitive questions that make limited connections between inherent messages in games and everyday life. Missing is a conscientization approach that challenges students to question their circumstances of their everyday lives.

4.4.1 Promoting Alternative Careers

A further illustration of how a common theme of understanding does not necessarily reflect the successful promulgation of a policy were responses to definitions of alternative careers. Participants responded that the goals of the decree highlighted an alternative career to the more established ones in business, farming, finances and medicine. For example, those progressing in sport and physical education could become professional athletes in football and athletics. One participant shared a success story of how they encouraged a student to get involved in athletics, which eventually led to a scholarship to study in South Africa. Another participant noted that those not achieving sufficient grades academically could focus on developing sporting skills such as those required by footballers as a way of making a living as professional athletes.

Reference to careers as professional football players was the oft-cited example of what students could achieve if they pursued sport and physical education. Professional
sports by their very nature tend to be highly specific, and competitive. The number of individuals who actually succeed in this career is very low. This also does not take into account the inherent gender inequalities of advocating an alternative career based on a predominantly male-driven sport. If opportunities are generally limited for any person to become a professional athlete, they are far more limiting for females. In addition, those females who do become professional athletes receive far less lucrative financial rewards than do male athletes. As a goal for lifting people out of poverty, the pursuit of professional football is not a realistic objective. Although widely cited among participants, this view is both limited and constitutes a misunderstanding of the decree’s goal. I found it equally telling about societal views on gender that, given the discussions, none of the participants referred to the Zambian female boxer, Esther Phiri, who, at the time of the interviews, was an undefeated Women’s International Boxing Federation Intercontinental Junior Lightweight Champion and constantly in the media (see the discussion in chapter 7). What I found particularly telling in discussions of alternative career paths were the rather limited examples participants could offer students. The narrow view of careers in sport and physical education seemed to exclude other subdisciplines such as psychology, physiotherapy and sociology.

Elaborating on their understanding of the goals of the degree and what it was trying to address, one participant noted that it could lead to the better administration of sport in Zambia. The participant suggested that the emphasis on physical education would lead to institutions of higher education, such as the University of Zambia, offering degree courses; subsequently, those administrating sport at government agencies such as the Ministry of Sport and Youth and Child Development would have qualifications in physical education, which is not currently the case.

4.4.2 Tracksuits and Physical Education

If physical education in Zambia’s future takes on a more prominent role within schools and in society as a whole, the perception of the sportsperson in a tracksuit will have to change and the many other options available in sport will have to be promoted. Zambia currently does offer courses in physical therapy, and one can take courses in sociology, community and social development or psychology and focus on an aspect of sport. There is a further role here for the Ministry of Education to illustrate how physical education
can be a path to careers in areas such as marketing, management and public policy, to name just a few. When I reflected on the responses of participants, I wondered if this was the ministry’s responsibility. It is also an opportunity for PETAZ. Sport and physical education offer more than two career pathways for countries like Zambia, and undoubtedly more options in the global North. If sport for development is to contribute to national development and to lifting people out of poverty, there is an opportunity to move participants beyond the skills developed in sporting activities and to expose them to careers beyond professional sports.

Alternatively, this need not be an individual opportunity for either the Ministry of Education or for PETAZ, but for both organizations to successfully exploit these opportunities as mutually reinforcing their goals. In the current circumstance of limited capacities to advocate and demonstrate the merits of pursuing a career beyond professional sports, a vicious cycle of sorts exists, so that the inability of one organization to break the mould or perception of the sportsperson in the tracksuit undermines the other organization’s agenda in physical education. As noted earlier, a clearly articulated strategy on the part of the ministry would go far in addressing the limited capacity within the education sector. Additionally, the identification by PETAZ of a cadre of physical education ‘champions’ who are trained in facilitation, and who articulate and promote the various opportunities that physical education and sport can offer, would go a long way in establishing physical education as a viable career that does not only involve participation in sporting activities.

4.4.3 Promoting Life Skills across the Education Sector

As noted earlier, the decree uses the language of life skills and emphasizes the holistic development of the learner. It is worth noting that the differing views of the goals of the decree are not wrong or inaccurate per se; however, the Ministry of Education is missing an opportunity to teach teachers and students skills that effectively address challenges in the education sector. A strategy to support the decree would help frame teachers’ understanding of the critical aspects of physical education’s enhancement of life skills and holistic development, essential elements in any meaningful HIV/AIDS prevention education.
It is worth asking if a student in the third grade in the town of Shan’ngombo in western Zambia receives a physical education lesson as consistent with the ministry’s larger objectives as a fellow student in Kasama in northern Zambia. Numerous factors will influence the quality of the lesson that the student receives; however, what should not be ambiguous is the lesson’s goal and how it can be used to address social challenges such as HIV/AIDS. As noted, much work is left to the interpretation of the teacher at the very time when teachers need more support, considering that some of them were not teaching physical education until they heard about the decree. Support in the form of more direct and collaborative involvement from PEOs and teacher training colleges in each of Zambia’s ten provinces could ensure that teachers across the country receive a consistent message and are trained accordingly. In the absence of such a strategy, teachers are left to their own devices, with NGOs providing much of the training on how to incorporate HIV/AIDS into physical education and traditional games (see chapter 5).

4.4 Chapter Summary and Conclusions

The preceding pages illustrate how the development and promulgation of the decree has contributed to how participants have come to understand its goals. This is an important starting point for any meaningful analysis of the potential of SDP within state schools and its potential contribution to HIV/AIDS prevention. These issues contextualize and frame the analysis of the subsequent chapters of this thesis, particularly regarding how physical education and sport are being used (or not) as a medium for HIV/AIDS prevention in Zambian schools (chapter 5). The contribution of PETZG to HIV/AIDS prevention is in large part determined by the education sector and the challenges it continues to face, particularly around questions of teacher training (chapter 6). In turn, an appreciation of the political economy that anchors the education sector can shed light on how successful the decree has been as an enabler of teacher voices and ameliorated gender relations (chapter 7).
Chapter Five:

Physical Education and Games as a Medium for HIV/AIDS Prevention

5.1 Introduction

At the outset, it is important to make the distinction between sport and physical education, as the meaning of these terms is often blurred and they are used interchangeably by many in the Zambian education sector. For example, the current imperative of the SDP movement focuses on sport and recreation as part of community development, as opposed to institutional education initiatives. I consider sport to be “all forms of physical activity that contribute to physical fitness, mental well-being and social interaction, such as play, recreation, organized or competitive sport, and indigenous sports and games” (SDP IWG, in Kidd and Donnelly, 2007, p.12). Physical education, on the other hand, can be understood as that area of a school curriculum concerned with developing students' physical competence and confidence and with enhancing their ability to use these skills to perform in a range of activities (Department for Education and Employment, 2000). Thus, this chapter (and the thesis as a whole) is concerned with children and youth enrolled in formal education. More specifically, this chapter explores how research participants incorporate the subject of HIV/AIDS into physical education as they develop children’s’ physical competence to perform a range of activities. This is significant, as all subjects in Zambian schools are required to incorporate HIV/AIDS as part of the Ministry of Education’s formal approach to addressing the disease in the education sector. This chapter underlines Houlihan and Green’s (2006) observation that individuals can be an important explanatory factor in policy analyses, especially when their influence is situated within the wider institutional context.

Research participants consistently noted how the inclusion of traditional games within physical education lessons engaged students by allowing them to identify and incorporate HIV prevention messages into local traditional games. However, the focus of this chapter is not to assess the role of physical education in preventing HIV/AIDS as much as to explore the educational and policy context for the implementation of a state-based educational approach to sport for development. In this regard, this chapter and the narrative on physical education and games as a medium for HIV/AIDS prevention is largely informed by a general description of how HIV/AIDS is incorporated into
Zambian physical education as advanced by interviewees, including the genesis of the template lesson plans that are at the heart of how HIV/AIDS is being taught within the subject. The chapter then examines the responses to the following five questions by interview participants:

1. How would you describe a successful lesson in physical education and traditional games with respect to HIV/AIDS?
2. In your school, what factors/issues allow for you to have a successful lesson in physical education and traditional games about HIV/AIDS prevention?
3. In what ways, if at all, has the teaching of physical education as preventive education about HIV/AIDS been problematic?
4. Have you attended any workshops or trainings on the use of sport and traditional games for HIV prevention?
5. Can you share with me any experiences you have of physical education and traditional games addressing the important issues for your school and students that you mention?

5.2 Physical Education and Education Sector Goals

It is perhaps useful to consider why physical education and sport may be favourable to the attainment of key education targets and the development of life skills essential in addressing HIV/AIDS. Available evidence on the merits of sport and sport for development suggests that in certain contexts within the global South, and when appropriately implemented, participation in sport contributes to personal empowerment (Brady, 2005; Brady and Banu-Khan, 2002), life skills (Koss and Alexandra, 2005), inclusion for people with disabilities (Blinde and Taub, 1999; Sentumbwe and Kahrs, 2001) and health promotion and awareness (Leavermore and Beacom, 2009). These studies make strong claims for the benefits of regular participation in sport and physical activity in contributing to individual development. As noted in the review of literature in chapter 2, there is a paucity of research with an explicit focus on how these benefits may be applied in the school curriculum in the global South.

Given the recent spotlight on physical education and, in particular, on the declaration of 2005 as the United Nations’ International Year of Physical Education and Sport, this gap in literature is even more surprising. Evidence of physical education’s
contribution to individual development in the global North is well documented. Bailey’s (2006) review of the benefits and outcomes of physical education and sport (PES) in schools concludes that PES has the potential to make significant contributions to the education and development of children and young people, although further research and evaluation is needed to better understand the nature of these contributions. While Bailey’s review does not primarily focus on the global South, his emphasis on understanding the context and nature of interaction between students and teachers is critical for future studies. Further, physical education can contribute to critical awareness by challenging and resisting dominant institutional pedagogies in a manner that supports Freire’s (1972) notion of conscientization.

The steps taken by the Zambian government echo the increasing work of international and local governmental and non-governmental organizations (NGOs) to mount concerted efforts to mobilize sport as a vehicle for broad, sustainable social development (Kidd, 2008). In sub-Saharan Africa, these efforts have centered on HIV prevention (Delva and Temmerman, 2006; Nicholls and Giles, 2007). The Zambian decree, espoused in the context of a society severely affected by HIV/AIDS, resonates with the United Nations Educational, Scientific and Cultural Organisation’s (UNESCO) preventive education strategy of addressing HIV/AIDS in the education sector (UNESCO, 2004). A focus of the decree was to strengthen the ability of teachers in physical education to contribute to anti-stigmatization and gender equity. This makes research into the 2006 Zambian decree on mandatory physical education significant as it focuses attention on how to incorporate the evidence of PES’s contribution to HIV/AIDS prevention.

Central to this chapter is the use of sports and traditional games for the development of critical social skills in the Zambian school setting. Such an approach generally aligns with Coalter’s (2009) notion of ‘plus sport’ as an approach to sport for development that gives “primacy to social and health programmes where sport is used, especially its ability to bring together a large number of young people, to achieve some of their objectives” (p.58). Understanding how to implement policies effectively, and understanding the experiences of those who strive to do so, is essential if the goals of HIV prevention education, and indeed other education and development goals, are to be
attained. Dyer (1999) argues that a large part of the challenge of reaching the Education for All (EFA)\(^{13}\) goals lies in increasing our understanding of the depth and complexity of policy issues. Central to this understanding is identifying the key individuals and their activities, from policy development to implementation, and incorporating their local understandings and experiences of policy implementation into future formal policy evaluation and analysis. As noted earlier, Zambia is projected to meet its EFA target on access to education, and the focus of education planning is thus likely shift to education quality. Physical education’s ability to contribute to education quality and evidence of the policy development and implementation of the decree will constitute critical debates regarding how Zambia is to attain this new target, particularly if the subject of physical education is to avoid its subjugation on the school curriculum.

Further, until recently, much of the literature used in support of physical education and sport programs has been uncritical of the use of sport and physical activity for development activities, with a paucity of strong evidence, effective monitoring and evaluation and comprehensive research into long-term impacts (Leavermore and Beacom, 2009). Much recent research and commentary on sport for development has challenged practitioners to better understand which conditions achieve desired outcomes; it has also exposed the tendency towards ‘sports evangelism’ within the movement (Coalter, 2010; Darnell, 2007; Donnelly, 2008; Giulianotti, 2004). In effect, these authors have offered a much more realistic view of how sport and physical activity for development is experienced and exercised on the ground. Despite the importance of their calls, the school setting and the work conducted by indigenous scholars and practitioners, particularly in the global South, is underrepresented in the literature.

5.3 Responding to HIV/AIDS with Physical Education and Traditional Games

The United Nations Department of Economic and Social Affairs (2004) conceptualizes the impact of HIV/AIDS on the education sector by noting three direct influences: the supply of education through the availability of teachers; the demand for education (total number of children and the number enrolled and staying in school); and the quality of education (supply of experienced teachers). The review of literature highlighted teacher deaths due to HIV/AIDS and the implications for the education sector. For example in its report looking at the impact of HIV/AIDS, the United Nations Department of Economic and Social Affairs (2004) reports approximately 56,000 primary school children of the estimated 1.7 million students enrolled in primary education, to have lost a teacher to HIV/AIDS in 1999. in Zambia. Henning (2009) notes that the loss of teachers results in fewer educational opportunities for students regarding HIV prevention efforts.

Despite these challenges, there have been efforts by academics and practitioners in the sport for development arena to promote initiatives that can address HIV/AIDS, education and long-term national development goals. The optimism concerning sport for development stems from the belief in the potential of sport to contribute to broader social development (Leavermore and Beacom, 2009). Mwaanga (2010) provides a useful and critical examination of the theory underpinning the use of sport in addressing HIV in sub-Saharan Africa. It emphasizes the role of leaders (and teachers), as the efficacy of a program depends on the organization and focus of the sport experience and on the care that leaders put into the program’s design. With so many teachers succumbing to HIV/AIDS, this places further strain on the possibility of addressing HIV/AIDS through school-based PE.

5.4 Incorporating HIV/AIDS into Zambian Physical Education

Echoing Bailey (2006), I was motivated to learn from interviewees how they perceived physical education (and the decree) contributing to the education and development of students; and how effective this was for HIV/AIDS prevention in light of Mwaanga’s (2010) observation that “sports for addressing HIV/AIDS initiatives have been implemented parallel to, and sometimes competing with, educational programmes within state schools … with sport for addressing HIV/AIDS remaining absent in many
teacher training programmes in SSA countries” (p.62).

Maro and colleagues’ (2009) conclusion that interventions using peers (out-of-school youth) in sport were more effective in transmitting HIV prevention knowledge than students receiving ‘traditional’ AIDS education through the school curriculum in Tanzania is particularly salient here. These conclusions were contrary to Maro and colleagues’ expectations that school-based HIV education would prove more effective. These results in part suggest that the use of peers (out of school) is relatively more effective in the transmission of knowledge than the use of teachers in the school setting.

It is worth noting that Maro and colleagues’ study did not distinguish between AIDS education taught through physical education or mainstreamed in individual courses, but aggregated AIDS education received in the entire school. As such, there is great potential for the responses of those interviewed in the current study to contribute to the literature and to provide a foundation for future control studies on the effectiveness of AIDS education through physical education. This is because some of the attributes Marol and colleagues (2009) cite as partial explanations for the apparent effectiveness of the use of peers are foundational objectives of physical education (Hellison, 1985). These include the appeal of popular sports (football) to transmit information and positive attitudes; changing norms (social, cultural and peer); and the facilitation of cognitive and behavioural skill acquisition through the regular practice of life skills through games in a fun and non-scary environment (Marol et al., 2009, p.137). Additionally, the education policy literature reviewed in chapter 2 stresses the significant influence of context (McLaughlin, 1987) and of how schools exercise discretion in response to policies (Clune, 1989). Not to undermine Marol and colleagues’ (2009) findings, but it could well be that the schools included in their study exercised discretion in a way that led AIDS education to being ineffective. The responses of participants, as shown later in this chapter, while mixed, confirm the influence of context and suggest that in some contexts, AIDS education can be effective in the school setting.
5.4.1. Template for Integrating HIV/AIDS into Zambian Physical Education

The 2006 workshop titled “The Use of Physical Education, Sport and Traditional Games to Address HIV/AIDS through the Educational Sector in Zambia” has a significant bearing on how HIV/AIDS is addressed in Zambian state schools through physical education and traditional games. The workshop can be regarded as providing a blueprint and a cohesive and replicable model across the country in regards to how teachers can incorporate HIV/AIDS into physical education lessons. The workshop provided physical education teachers, teacher trainers and curriculum specialists and community organizations such as EduSport, Sport in Action and Student Partnerships Worldwide with an opportunity to share the challenges faced in the sector and to recommend ways of revitalizing physical education in an era of HIV/AIDS. One of the research participants who attended provided a useful description of the workshop, one that contextualizes the workshop’s role in how physical education teachers have come to learn about the incorporation of HIV/AIDS into their subject. The description was provided in response to whether the participant had attended any workshops or training on the use of sport and traditional games for HIV/AIDS prevention.

Researcher: Have you attended any workshops or trainings on the use of sport and traditional games for HIV/AIDS prevention?

Interviewee D: Yes, we had one workshop at the University of Zambia in 2006 which was co-sponsored by Toronto University, University of Zambia and UK. During that training we had that component of incorporating traditional games in the teaching of Special Physical Education, trying to use the traditional games to teach HIV and AIDS issues. Later on we had a follow-up workshop again which had similar component of using traditional games. The workshop was very nice and it incorporated not only theories but practical. We demonstrated some traditional games and how we could use those traditional games in the teaching of Physical Education. [sic]

Researcher: When you say nice, what do you mean? The workshop was nice, just some examples of some of the major lessons or contributions that, walking away from the workshop, you felt that you had learned?

Interviewee D: We had various presenters from other countries including Tanzania, Kenya, Namibia and UK, and Toronto University, in Canada. We learnt a lot of things concerning how to use these traditional games and even we learnt more traditional
games, some of us who had never had an experience to participate in those games at childhood level. I think it was beneficial to many of the young people who are coming up. Those are some of the major things that we learnt and then we learnt how to develop a lesson plan incorporate, teach the life skills, sports skills, physical education skills and then get some of those traditional games put them in the lesson plan and teach that traditional game as a physical education activity with messages about HIV/AIDS. And then the most interesting part was that we were also asked to develop some games, I mean to come up with some games and present them using local materials, and I remember we demonstrated and I think we did a very good job. [sic]

A key objective of the 2006 workshop was to “impart knowledge of, and skills for, teaching traditional Zambian games and movement activities as a vehicle of preventive education about HIV/AIDS” (2006 UNZA-UofT Workshop Final Report submitted to the Canadian International Development Agency (CIDA). In trying to achieve that objective, participants were taught and tested in movement games adapted from Mwaanga’s (2002) Kicking AIDS Out through Movement Games manual. The traditional games component was adapted from the documentation of traditional Zambian games and movement activities by Musheke Kakuwa (2005). Sample lesson plans were developed illustrating how to incorporate HIV/AIDS in lessons. A key takeaway lesson for participants was the identification of sports skills and life skills objectives for every lesson. Illustrated below is Mwaanga’s independent “Kicking AIDS Out” (KAO) session plan that was used at the 2006 workshop:

**Figure 5.4.1. Integrated Physical Education Lesson Plan (Mwaanga, 2002)**

Date: 03.07.02  
Venue: St. Patrick’s school  
Time: 14:00 hours  
Duration: 30 minutes  
Group: Girls  
Age: 8/9 years Number: 40  

**KAO Objectives**  
Life Skills Objectives (LSO): To help players understand that HIV infection in our community is spreading rapidly  
Sport Skills Objectives (SSO): To help players learn sprinting and changing direction while in motion

**Equipment**  
Soft homemade balls

**Organization**  
Verbal introduction and warm up with game—Sugar Daddy (5 minutes).
Main Content
• Jogging to sprinting when coach blows the whistle (5 minutes).
• Jogging to change of direction when coach blows whistle (5 minutes).
• Group relay games combined with picking cards with "HIV spreads fast" written on them.
Race to a 30m line, pick card and race back to starting point and tag the next player. Place the card in an agreed upon order near the group (15 minutes).

Conclusion
• As part of the final activity, the activity leader facilitates a discussion about how fast HIV infects a population (3 minutes).
• As part of the child-to-child assignment the players must go home and teach their younger siblings about how fast HIV infections can be spread in the community.

It is worth noting that as a requirement for attending the workshop, all the workshop participants had to pass a knowledge and skills competency test in teaching Zambian traditional games and movement activities as a method for teaching preventive education about HIV/AIDS.

5.4.2 Integrating HIV/AIDS into Zambian Physical Education After the 2006 Workshop
Interviewees described incorporating HIV/AIDS into their lessons in ways that seemed to reflect the five broad but related approaches that underpin sport for addressing HIV/AIDS initiatives in sub-Saharan Africa suggested by Mwaanga (2010). Similar to Marol and colleagues (2009), Mwaanga (2010) focused on the non-school setting. However, interviewees spoke about and highlighted how they perceived physical education addressing HIV/AIDS through “moral development; positive diversion; a convening nature (hook); fostering empowerment; and improving health for people living with HIV/AIDS” (p.62). For example, interviewees provided the following responses to questions on whether the use of physical education made a difference in addressing HIV/AIDS:

Researcher: Are you sure they are making a difference?

Interviewee P: As a teacher when you are teaching, even in any other subject, you would be able to tell after the lesson, you find the that pupils you find them in the compound practicing the same games that you were sharing with them, so you will be able to see that all pupils enjoyed this and they are still continuing so whatever we did there did not just end on the field of play but even in the compound. [sic]
Researcher: Can you tell me about student engagement in your classes when you are teaching? What are some of the popular activities, or which activities do students find exciting? How do you know that students are really engaged in what it is that you are teaching?

Interviewee Q: I think, most of the activities I have been teaching them they do love them. You make the pupils have interest, if you as a teacher participates, but if you just tell them do this, do that, it will be difficult for them to enjoy the lesson. So for example, if I would say, there may be skills in netball or skills in football, I have to participate and make sure that each and every pupil participates also. If for example, I talk of manipulative activities, I would do maybe, locking horse as a teacher myself, the pupils also participate and they would really enjoy it. Most of the times I teach Grade 8 and you find that even Grade 12 would even want to do the same activities, because they see me as a teacher participating. So most of the lessons that I have taught, my pupils have loved them, even when I am not there, they would prefer, if they are not having any lesson in any other subject, they would prefer we go for Physical Education than learning that lesson. [sic]

What immediately becomes apparent in hearing interviewees describe physical education lessons is the rather rigid and prescribed approach that teachers faithfully adhere to in their teaching and incorporation of HIV/AIDS. The responses offered by participants confirm the “banking” relationship that Freire (1972) challenges with emancipatory education. How interviewees described the lessons can be crudely summarized as them having “a beginning, middle and end”. The beginning of the lesson involves warm-up exercises (e.g., stretches); the middle core involves physical activities (e.g., playing games that involve running, throwing, etc.); and the end involves cool-down exercises and discussion. These activities and the underlying message are usually reinforced with songs (often traditional ones) that can improve children’s listening and memory skills (Davies, 2011). Often when I asked for a description of how the individual integrated HIV/AIDS into his or her lesson, the participant would ask if I wanted them to explain “all the parts” of the lesson, a reference to the sections of the lesson plan. The following exchanges with interviewees speak to the faithful adherence to prescribed lessons:

Researcher: How would you describe a successful lesson in physical education and traditional games with respect to HIV/AIDS?

Interviewee J: You want me to explain the parts?

Researcher: NO. Just briefly how if you were thinking of what a successful lesson on HIV AIDS, in a few words, how would you describe it?
Interviewee J: I think it is interesting, for instance, when you are about to start those warm-ups, because in fact with warm-up activity you introduce an activity, warm-up activity in connection with HIV, then after that you get into the main activities and then at the end of a lesson you also again emphasize on points and there you even integrate them, you explain to them that actually as we were doing the main activities, you explain, this we relate to HIV or a patient and then what you are doing here is you are helping that patient, to make him/her healthy. It is quite interesting. [sic]

Researcher: How would you describe a successful lesson in physical education and traditional games with respect to HIV AIDS?

Interviewee F: A successful lesson is supposed to, as you are aware is supposed to have all the components and all the components should be followed strictly and there are some other issues which also may need to be followed like maybe knowing the age and what type of exercise to give them, the learners, because if it is not followed, which means you either overdo or underdo the exercises, so it should be something that should be balanced and have all the components from the warm-up to the last end the cool-down. [sic]

It is interesting to note that none of the respondents asked for clarification on how I defined success in the context of the question. While respondents were universal in their belief that physical education was beneficial, their understandings and responses to the question provided interesting and at times contrasting responses. The diversity of responses lends further support to the argument for clearly articulated policies with well-defined goals and objectives and evaluation processes. The following responses to the question on what constituted a successful lesson with respect to HIV/AIDS further illustrate this:

Pupils should be able to do the activity that they have been taught and also put whatever they have been taught into practice as they go. At the end of the day, I would ask them oral questions, for example, I would give an example of maybe I am teaching on locomotor skills, and then I ask them to do those physical activities, for example running, while we are singing or playing kankuluwale or other songs involving HIV/AIDS. At the end of the day, I would ask them questions about the importance of physical education in relation with HIV/AIDS, how physical education helps to reduce the HIV infection to the other person. So at the end of the lesson I would ask them questions orally, sometimes practically. When I ask them questions, I will be able to assess if they have understood, if the lesson is successful or not, depending on the way they are going to respond. [sic] (Interviewee Q)

I think a successful is when you teach it and you get more feedback, then I think you know that this lesson has been successful. When you teach pupils and then they tend to
understand what you have said, they ask you they want to know more, then you know that the lesson is very successful. As they ask you questions they get the information which they want to know. Because if they just keep quiet, then you know there is a problem somewhere, because you will not be sure whether they have understood or not. But if they ask you questions and at the end of the day you ask one of them to explain and he explains very nicely, then you know that I think we are getting somewhere. [sic]
(Interviewee H)

When you want to teach a lesson you start with introduction, then you come to the main body, then conclusion, so you start with the introduction, quite alright depending on the topic you are teaching, is it relating to HIV/AIDS on the same topic, then at the end after teaching that is when you ask the pupils some questions, you ask them how they can reason themselves concerning the same alleviating of HIV/AIDS, then you evaluate from there, that today at least may be I have achieved my 68%, 50% so on. [sic]
(Interviewee I)

A successful lesson as for me, I like it when three-quarters of the pupils are able to perform the activity, then at least I know I am getting a step further. And if I ask them a question towards a lesson, I should have answers from the pupils, then I know my lesson was successful, but if I only have some pupils, maybe one or two answering, then I doubt myself, I have to go back and I stress my points, and I make sure everyone has an idea on what I am doing. [sic] (Interviewee L)

The responses to the questions on what individuals considered a successful lesson suggest a strong association of structure to success. If one followed the structure of the lesson plan, one was successful. Given the subject matter of HIV/AIDS, clearly defined outcomes on the part of the Curriculum Development Centre and the Ministry of Education are just as significant as the Presidential Decree. How does one measure success when there is ambiguity with regards to the intended outcomes among those charged with delivering the success? The ambiguity about outcomes means that a sense of which factors may lead to favourable outcomes is very much open to interpretation. A consequence of this is that teachers are left to their own devices as they try to determine what an appropriate outcome is when integrating HIV/AIDS into physical education lessons. This has the potential to undermine the Ministry of Education’s response to
HIV/AIDS as it maintains the status quo and does not necessarily elevate the teaching of physical education to match the presumed seriousness of HIV/AIDS.

A central element of the lesson is the ability of the instructor to connect the physical activity and the values being taught, as well as to encourage the lessons to be applied outside the classroom, which is key in addressing HIV/AIDS. This application outside the classroom aligns with Freie’s (1972) conscientization. Physical education’s contributions to the development of values, such as caring, respect, self-direction and participation, are well documented. Students engaging in physical education with a supportive instructor can become more responsible, as “‘Respect’ and ‘Caring’ addresses the students’ social and moral responsibility for their relationships with others and as members of groups; ‘Effort’ and ‘Self-Direction’ will address the students’ responsibility for personal development” (Hellison, 1985, in Physical Education 1–5, Saskatchewan Education, 1998). Hellison (1985) further notes that participation can contribute to the transfer of responsibility from the physical education curriculum to the lives of students in school, on the playground, at home and in the community. When teachers engage in discussions (usually at the end of the lesson) about HIV/AIDS, an attempt is being made to develop critical awareness by imparting the above-noted values and empower students. These values are essential elements in individual responses to the risk of HIV, the lack of which places individuals (and societies) at a greater risk, particularly with regards to HIV-related stigma and discrimination. Individuals benefitting from these values can develop resiliency and the ability to retain and act on critical information about HIV/AIDS. However, how these values are taught in the classroom and on the playground remain an area requiring further scrutiny. In particular within the context of HIV/AIDS, it requires careful and regular support to teachers, so that these are able engage students in ways that support key prevention messages and do not merely encourage the repetition of information. This is an important issue, as some activities, depending on where the activity stops or how often an individual plays a particular role in a game, may reinforce societal stigmas and discrimination against individuals. The following response and illustration of a game highlight the need for care not only in how games are played but also in how discussions are conducted:

Researcher: *Tell me about the games that you teach?*
Interviewee F: Let me give you one example, for instance, Ubwambe, it is done in different ways. There times when you have a ball, you can either make a circle when someone has that ball he will be chasing his friend, and they give them different balls, and he should make sure that that ball does not touch her, if it does, we say that one is maybe, there is a specific ball for syphilis, gonorrhea, and these other STIs, then there must be one for HIV, so you are able to know that if someone is caught with gonorrhea, you set a clinic to attend it, someone goes there, he is counseled, then he is told that that disease can be cured, then he is told also that the people who are involved in this, there is someone who get this through defilement or what, but other things that are involved which lead to this we say beer drinking, doing this, disobedient, then if one has been caught with a ball with HIV/AIDS that one goes to the clinic, he does that, then he goes to another group where there are counsellors, they counsel him or her, then he goes for HIV tests and how we are supposed to live. [sic]

The game ubwambe that the participant refers to is also known as aka lambe and is akin to the game tag. Tag has many variations around the world, but it essentially involves one or more players chasing others in an attempt to tag/touch them. In the example noted above, the various players attempting to tag the other players represent the diseases syphilis, gonorrhea, and HIV. When a player is tagged they become ‘infected’ with the disease and will have to visit a stall that has been set up to represent a clinic for counselling or treatment. The care and supervision that an instructor shows throughout this process is important, so that students do not walk away from the game with the idea that one can contract syphilis through touching, as was done in the game for example. Sport in Action (2004), in its manual on incorporating HIV/AIDS education into traditional games, uses the game ubwambe to illustrate how sexually transmitted infections (STIs) may be spread. As presented in the manual, if a student/player repeatedly gets caught over a period of time, there is potential for teasing and bullying that go beyond the child’s abilities in the game and that can lead to the person being associated with STIs and HIV infection in real life. Teachers in this regard need to be mindful of the potential of reinforcing stigmas and discrimination. Sports in Action’s (2004) illustration of the game is reproduced overleaf:
3. ZAMBIAN TRADITIONAL GAMES INTEGRATED WITH HIV/AIDS, DRUG/ALCOHOL ABUSE & CHILD RIGHTS EDUCATION

3.1 Akalambe
The game akalambe (touch/sag game) is a common game played throughout the country. Akalambe involves two teams, one chasing and the other dodging. This game is played in a field, which is usually triangular and partitioned, using lines into regions in which the teams will be chasing and dodging each other.

Requirements
- Marked field
- No equipment needed

Rules
The game is played on an even flat ground in order to prevent injuries due to poor playing surface. The field has regions in which dodgers can stay safely away from the chasers. The chasers are avoided points by stopping or touching their opponents. The participants that are tagged will be out of the game, only to watch and cheer for the remaining team members. The dodgers run from one end of a line to the other, making every movement to avoid being touched out. Upon the dodgers being touched out, the chasing team becomes the dodgers and the dodgers become chasers.
This may go on repeatedly as long as the performers are in mutual agreement or, for the sake of standardization, we suggest a competition schedule of the best of 3, 5 or 7 games. A game in this case shall be referred to as one dodger-chaser contest. The number of competitors shall therefore need to be equal on both teams. The dodgers shall be declared winners of each contest when an agreed percentage of the team members successfully dodge through from the starting end line to the other end back. Failure to achieve this by the dodgers will automatically lead to the declaration of the chasers as winners of that particular contest. In the next contest the dodgers will be chasers and vice versa.

Children sliding each other farewell play a more spontaneous kind of akalamba openly. Upon saying bye to each other, one of the children tags the other and runs towards home, the tagged child runs back after the one who tagged him (her) first until he/she tags back if not he/she would have lost the game for that day.

Psychomotor and psychosocial value
This game develops the child's basic motor skills of running, tracking and touching combined with intellectual development through dodging and chasing under the umbrella of competition. This game may be used as a prerequisite for higher and standard games/Sports such as athletics, rugby, etc. The performers learn to co-operate as they play in a team and follow rules, hence developing into law-abiding citizens.

HIV/AIDS Integration
Objectives
By the end of the session participants should be able to state:
- What STIs are
- Ways in which STIs and HIV/AIDS can be acquired
- How HIV/AIDS spreads
- The benefits of Voluntary Counseling and Testing (VCT)

The game can be used as a conduit for HIV/AIDS life skills peer education by mixing a peer education corner on the side of the playing area. The peer education corner will have at least one trained person preferably of the same age group as the participants, who will be equipped with structured questions and answers on a particular topic that would be played for the particular session. The touched out participants from the game will immediately go to the peer education corner and be educated through question and answer. The participant who answers correctly certain questions may be allowed to return to the game immediately as a dodger while those who fail to answer correctly may be given a waiting period before they can take part in the game again.

An option will be to award game winning points to participants who answer correctly. Group or focus group discussions on certain topics may be held after the game with or without reference to the game.

The game of Akalamba can help the users interpret the way sexually transmitted infections (STIs) are spread and further raise awareness on preventive modes and seeking treatment at first signs of infection.
A further example of the role of games in addressing discrimination is a popular game in Zambia called “sheep, sheep come home,” also called “sugar daddy”. This game has been adapted for schools to include an HIV message. Traditionally, the game is played with students/children in the roles of sheep, trying to get to safety (home) without being caught by the lion. In the era of HIV/AIDS, the games have been adapted with the lion representing a ‘sugar daddy’ who tries to seduce kids with money, gifts, and the like. One of the major concerns with such a game is that it always ends with the lion/sugar daddy capturing the sheep/kids, which gives an underlying fatalistic message if one does not have the means (sports skills, income) to overcome the advances of the lion/sugar daddy. This is exactly where the care and facilitation skills of the instructor are important. Too often in Zambia, the discussion ends with avoiding the lion, without sufficient exploration of the options available to an individual who may not possess the means to overcome the lion’s speed and agility. The message here is for an equal focus on an individual’s vulnerabilities. Often, the language of sport and physical education speaks of personal empowerment and essentializes the benefits by the simplistic underlying message of overcoming HIV/AIDS by avoiding the lion/sugar daddy. As important as the message of avoidance may be, it has to be couched in societal structures recognizing that individual empowerment alone does not overcome issues of poverty, historical gender bias and discrimination. Given the use of games to address HIV/AIDS in schools and in local communities by sports NGOs, and given also Marol and colleagues’ (2009) finding of more effective AIDS education outside schools, I contend that it is perhaps better to have a qualified teacher addressing these types of discussions than a peer or an individual who may not have had any formal training on making class activities inclusive and exploring social changes faced by students. The game “sugar daddy” is illustrated overleaf:
Figure 5.4.2b Sugar Daddy
Source: Mwaanga (2002)

Description
The object is for players to try and make it across the safe side of the city without being tagged. One player is picked to be the non-man or child aba (in Zambian called the Sugar Daddy). The Sugar Daddy who stands in the playing field, calls out to the kids. He asks the game by calling the rest of the players to play with him or her. At this time, the players are outside the city (safe side). He tries to convince them to approach him. The rules may be as follows:

Sugar Daddy: Kids, kids, let's go out and have fun together
Kids: We are afraid
Sugar Daddy: What are you afraid of?
Kids: We are afraid of being tagged
Sugar Daddy: I will buy chocolates and chips for you.

After the third statement, the Sugar Daddy successfully gets his efforts and the kids are convinced it is safe to play with him. The players enter the city. They must run across the playing area in the other safe side without being tagged by Sugar Daddy. When tagged, a player joins hands with the Sugar Daddy and together they choose another player. No player is tagged, they continue to link with the Sugar Daddy to form a chain. When there are more than three Sugar Daddies, the chain must split up. When the last player is tagged, the game begins again with someone else standing in the Sugar Daddy.

Before the game starts, the participants plan and agree on how they will answer and challenge the Sugar Daddy when or when she tries to persuade them. It is important that the players tell the teachers and parents the words that are used in real life situations.

Verifying the Degree of Challenge
Conduct:
- We have five players, can they escape?
- We blindfold the Sugar Daddy and have the players tag one another as they would in being tagged?
- We have players not backwards?

Alternative for your new game
- Eliminate
- We increased or reduced the size of the playing field
- We have many Sugar Daddies
- We blindfold the sugar daddy and reduce the playing area
- The sugar daddy and the players must call the elements during the game (e.g. Sugar Daddy, have no AIDS)

Recommendation
This game is suitable for physical education lessons and can suit the cultural context. It may not be suitable for a warm-up or cool-down, because of the time. It can also be physically challenging and slow.
5.5 Inclusion of Traditional Games in Physical Education for Addressing HIV/AIDS

Interviewees were unequivocal in their belief that physical education was beneficial but that it had to be considered in the context of myriad influences on the student. In citing the effectiveness of physical education, interviewees consistently noted how the inclusion of traditional games within lessons engaged students by allowing them to identify and incorporate HIV-prevention messages within them. They also assigned homework on the topic and asked students to discuss their experiences. In this regard, traditional games are becoming critical components in how teachers engage students to learn about HIV and AIDS, both inside and outside the classroom. The responses of the participants support Ogoye’s (2005) contention that traditional games can contribute to addressing health priorities in developing countries.

The responses of participants further suggest that traditional games were empowering for teachers, enabling them to exercise creativity as they sought unique ways of incorporating HIV/AIDS messages into games specific to particular tribes and towns, in the process contributing to these games’ preservation similar to Sutton-Smith’s (1985) observation on what is required for the preservation of games. Creativity in this context can be understood as a form of resistance, as teachers adopt and teach activities that lie outside the rigid structure, or outside the ‘banking’ style of education noted earlier in the chapter. The physical education curriculum does not prescribe which particular traditional games to use for HIV/AIDS prevention, and as such, the incorporation of traditional games challenges the dominant educational practices that continue to privilege non-traditional Zambian sports. Dart’s (2004) study exploring how the use of visual culture education can empower students to engage in ideological and cultural struggles is useful for conceptualizing the use of traditional games as a form of resistance. Discussing resistance, Dart (2004, p.317) comments:

To be of genuine pedagogical value, resistance must be re-envisioned as a generative site of consciousness-raising, a location where students and teachers together are able to critically reflect upon and effectively challenge repressive practices and dominant structures that reinforce the inequities of the status quo. Resistance thus conceived becomes both disruptive and creative, a site of thoughtful opposition and a place for reflective inquiry and meaningful
engagement. This definition is akin to Giroux’s (1983) notion of resistance, which he felt needed to be evaluated against the degree to which it promoted critical thinking and galvanized “collective political struggle around issues of power and social determination”.

Dart’s (2004) approach to resistance is helpful in the Zambian context as it captures the notion that resistance, through pedagogical practices in non-dominant subjects on the curriculum, Art in Dart’s (2004) study and physical education in this current study, is possible and does occur. The decree on physical education has led to the disruption of the typical school schedule in which other subjects are given higher priority. Additionally, the vagueness of the decree has meant that teachers are able to exercise discretion in its interpretation and implementation, which itself can be seen as a form of resistance. This process of resistance has been empowering for many teachers. This feeling of empowerment extends to students as well, who now demand to be taught physical education, while often citing the decree’s requirement of compulsory physical education. The following responses from an interviewee illustrate this belief:

*Researcher*: These games, do you think they are making a difference?

*Interviewee K*: Very much … and they are more interesting than the contemporary ones. They are making a very big difference. [sic]

*Researcher*: Are you sure they are making a difference?

*Interviewee K*: As a teacher when you are teaching, even in any other subject, you would be able to tell after the lesson, you find that the pupils you find them in the compound practicing the same games that you were sharing with them, so you will be able to see that also pupils enjoyed this and they are still continuing, so whatever we did there did not just end on the field of play but even in the compound. [sic]

The responses of interviewees suggest an enthusiastic response to the decree, with many respondents perceiving the decree as an opportunity to revive the ailing fortunes of physical education, specifically as playing a vital role in the education and development of students. In the above response, it is also interesting that traditional games are favoured over contemporary ones. This lends further support to the discussion about resistance to cultural domination and allays some of Whitson’s (1983) concerns about
homegrown cultural forms (traditional games) being seen as less attractive than cultural forms (contemporary games) by locals.

While most interviewees were quick to suggest how effective physical education has been in addressing HIV/AIDS, they did note the importance of contextualizing any analysis of physical education’s contribution to the fight against HIV/AIDS in light of issues such as poverty and long-held social beliefs. In this regard, physical education and indeed sport are not the answer but can only be part of a broader solution.

Of concern in the responses offered by interviewees was the limited support respondents continue to receive with respect to the latest information about HIV/AIDS, including its incorporation into and delivery in physical education lessons. This means the seminal aspects (instructor facilitation skills) of the use physical education to address HIV/AIDS are not appropriately recognized leading to the dissemination of potentially counterproductive and fatalistic messages. This concern is in line with Mwaanga’s (2010) cautionary note on sport addressing HIV/AIDS when the subject remains absent from teacher training programs, especially since instructor facilitation is a key element of the preventive education’s success With traditional games proving to be popular both among students and among teachers, and providing “rootedness” in terms of HIV/AIDS communication and intervention (Ogoye, 2005), an opportunity is being overlooked to develop critical skills on HIV/AIDS. Despite these concerns, however, teachers do offer an alternative to the use of peers, an alternative that has at least received training in the pedagogy of physical education.

5.6 The Teaching of Physical Education as Preventive Education as Problematic

As an indigenous scholar with a history of working within the physical education community, I felt I would have a richer appreciation of some of the antecedents Taylor and colleagues (1997) enumerate, in particular of the antecedents that have shaped how physical education is taught in the context of HIV/AIDS. For example, Mwaanga’s (2002) “Movement Games” lesson plans circulated at the 2006 workshop are pertinent antecedents to how HIV/AIDS is being incorporated into preventative lessons today, regardless of whether the Curriculum Development Centre (CDC) or the Ministry of Education has documented this. This is because PETAZ conducted workshops following the one in 2006 in which the lesson plans were circulated. Because respondents are
unlikely to be able to identify or attribute the foundations of their lesson plans, researchers not familiar with the development of physical education in Zambia might omit an essential event in physical education’s history, particularly as most of this development is retained verbally, rather than being documented in the ‘traditional’ way. By ‘traditional’ I mean a systematic documentation through official reports that include a contextual background. Additionally, a researcher without this background is likely to focus on commonly cited challenges (the subject not timetabled) and opportunities (make the subject examinable) in the physical education community. As such I was interested in going beyond the often-suggested ‘lack of equipment’ as a particular problem, especially because the decree and the 2006 workshop emphasized that equipment was not essential. Furthermore, I believed a focus on equipment would prove rather narrow and would avoid the kind of sociocultural analysis that could provide richer insights into the potential and limitations of physical education for addressing HIV/AIDS. A focus on equipment, for example, does not get to the relationships and interactions within the school context that might point to the real challenges of the decree’s implementation. From an education policy perspective, problem definition and what it reveals or what can be inferred from it are particularly salient, as Taylor and colleagues (1997) argue. With this in mind, the responses offered by participants about what they considered problematic would highlight areas requiring particular attention, as well as, possibly, limitations in the decree’s implementation.

5.6.1 Conformity to Social Mores

An underlying theme in the responses offered by participants to the question of what they considered problematic in the teaching of preventive education and HIV/AIDS was that of conformity to social mores or, more specifically, the deviation from expected behaviour and the interaction of girls and boys as a result of participation in sport and physical education. In general, boys and girls are expected not to have close physical contact, and during participation in sports, girls are expected to assume more demure and nurturing roles, while boys are expected to be more boisterous and louder. Boys and girls will tend to participate in physical activity among their sexes. Kakuwa (2005) discussing the participation of girls and boys in traditional games recalls how:
Like the Athenians of old, Zambian girls were pushed out in the background. Games (especially vigorous ones) were considered boys’ activities …..the girls, however, obtained talent of dancing (p.2).

The issue of deviation from social mores in participant responses was therefore not entirely surprising with regards to respondents from rural schools. What was surprising, however, was the expression of the same sentiment by participants from urban schools.

Some participants highlighted a lack of equipment as being problematic, but the response that particularly stood out for me related to the teachers’ abilities (or lack thereof) to be creative in how they incorporated HIV/AIDS into their lessons. One participant offered, in a way, a succinct overview of what has proven problematic, an overview that spoke to the underlying themes expressed by most participants:

*Interviewee D: In some areas it may be difficult for one to teach HIV/AIDS issues using physical education in terms of the concerns of parents; they may discourage the mingling of boys and girls as this may be a hindrance. Parents have accepted that children should learn together and they will learn issues of HIV and AIDS together with boys and girls. From those workshops we have had some teachers mentioned that some parents do not like their female children, the girls in those attires they wear during PE, to be exposed and mixing them with the boys, they think that it would encourage them, arouse their sexual interest and later on find themselves having sexual intercourse. There is also fear that when their children go into camps in terms of sports, the parents have a fear that they will indulge themselves into a lot of sexual activities. That could be a hindrance. Sometimes you find you want to go with this child for sports, and the parents, say no, I don’t want my daughter to go, because parents have a fear of their children being loose and careless when they are out. For us as teacher trainers, we have emphasized that we should work every time with parents, involve the parents in whatever activities you are doing, more especially us who are dealing with children who have disabilities who are delicate, the parents have a fear whether they are safe in the hands of the teacher or not. But we have encouraged our students during training that parents must always be involved in handling their children, especially during sports activities. They have raised a lot of concern. [sic]*

The above response captures several themes that I attend to in the following sections. The points raised touch on broader socio-cultural factors that are worthy of interrogation and that illustrate how indigenous perspectives can provide richer insights of meanings and beliefs.
5.6.2 Attire and Dress in Physical Education

Participants spoke about attire worn during play and physical activity as being problematic, with parents often in disagreement, citing attire such as skirts and shorts worn by girls as likely to rouse the interest of boys (and of male teachers) and to lead to dating relationships and possibly sexual relationships. In some cases, parents have associated the wearing of shorts or exercise clothes with ‘walking naked’. Perhaps unsurprisingly, the talk of inappropriate dress largely focused on girls. This is particularly interesting as it is not unusual to find boys participating in sports and physical activities topless. In Zambian tradition, dating relationships among teenagers are frowned upon, with parents tending to acknowledge these relationships only once an individual is beyond their teenage years. Barton and Pillai (1999) capture this aspect of Zambian cultural life by noting that “social control over sexual relationships varies across ethnic groups … among the Bemba, a large ethnic group, boys and girls are often separated at the age of eight or nine” (p.381). The following responses illustrate the experience of two interviewees:

Interviewee Q: When they dress like that, some parents would say, you allow the girls to move naked like that when there are male teachers in the school. That would attract a male to propose a girl child. So they wouldn’t want their children to dress like that, they wouldn’t love to have their children to go for swimming with the boys. With them they would look at that to be wanting the girls to be in relationships if they dress like that, make the boys to be attracted to boys. So those are the problems we face especially in rural areas. [sic]

Interviewee K: Like I mentioned, the issue of social economic background, the upbringing of the children, those who are used to mingle usually have no problem to play around and end with the games, but those from the poor social economic background you find that, sometimes, I am not saying this is always the case, you find that when they come together like that, to them it seems like, it becomes like an opportunity for them to go further, to the extent of proposing one another. We have had situations where parents have come in, especially Grade 9, a parent would come in to say, my boy and this girl have been flirting around, for me as a PE teacher, I am able to see the relationships, those relationships even when we have PE lessons and even as much as I would come in during the lesson, to try and overcome that, I would not be able to do that when they go out in the compound. So somehow, I see it as a challenge, it is a big challenge, which I would say maybe I would not be able to solve as at now. [sic]

I found it interesting that discussion on attire focused on the action of girls, that is, on what they wore, and was silent on the reaction of boys and males to the attire. One gets
the impression that it is justifiable, expected and will always lead to dating relationships whenever girls wear attire deemed inappropriate. The voice of girls in this discussion, their willingness and the abilities to refuse such proposals from boys/males, was negligible. This to me seemed a larger problem for Zambian society, particularly in the context of HIV/AIDS.

Given the repeated reference to dress and attire, I felt the responses did not comprehensively focus on dress by including, for example, the shoes (or lack thereof) students wore during activities. In rural areas, and more specifically with activities occurring on fields of play that do not have grass, the likelihood of injury is high, but this did not seem to be an overriding concern. There seemed to be an acceptance that some students would be unable to participate in physical activities with appropriate shoes due to poverty. Significantly in the discussion about dress, there was no real exploration of alternatives. For example, could activities be modified and/or alternative activities be adopted that would allow students without shoes or those not allowed by parents to wear shorts/skirts to participate? I thought of this question as I remembered the respondent who noted that one of their classes consisted of approximately 50 boys and 6 girls. Given the social pressures regarding the interaction between the sexes and the views about dress, I wondered what efforts, if any, were taken in situations such as this to accommodate individuals and to ensure a safe, inclusive and supportive classroom atmosphere.

5.6.3 Role Models

A particular challenge that I believed participants faced, although they did not identify it as such, was that of being role models and society demanding that they be morally upstanding citizens. It seemed to me that participants took on the extra responsibility that came with being perceived as eminent members of society. Being a teacher may not offer much by way of monetary rewards, but the profession remains respected in society, with the consequence that teachers must match the high regard placed on them in their everyday lives, in and out of school. This perception is likely to vary depending on location, with teachers in rural areas much more likely to be highly regarded and seen as very knowledgeable as they contribute to the development of children and thus shape the future. This contrasts with the perceived relatively low status of the profession in urban
areas, where teachers are likely to viewed as facilitators of knowledge and merely guides in a child’s development.

Given that teachers and students live in proximity to each other in rural areas, I expected the notion of the role model to be especially strong in rural areas. In listening to participants, however, it became apparent that the pressure or expectation of being a role model was just as great in urban settings. The following response illustrates this:

Interviewee G: *I think even us, the very people who are teaching our young ones through the same sport, we need to be role models, because it won’t make sense if I say no, you should abstain and me the person who is telling you that I don’t, you see my behaviour to be reckless, it will not make any sense.* [sic]

Being a role model was significant for both male and female teachers. Female respondents appeared to recognize a unique role they had as individuals who participated in sport and physical activities, a role that until recently has been the preserve of males, not only in Zambia but in many societies internationally. Female participants spoke with pride about how they maintained careers in physical education, a subject area that remains a bastion of male dominance, although signs of greater inclusivity are becoming more evident. These female respondents also viewed themselves as being particularly important role models for girls, as they embodied the perseverance and associated benefits often cited as essential to overcoming challenges and to succeeding in life. This is particularly important in an HIV/AIDS context: female teacher role-modeling for young women has been shown to have a positive influence on girls’ self-esteem, leadership and willingness to challenge unequal gender norms in African contexts (Bajaj, 2009).

In reviewing the responses of the participants, what particularly stood out for me, and was also unexpected, was the notion of creativity and teachers’ abilities (or lack thereof) to incorporate HIV/AIDS into their lessons. This stood out for me because only one respondent commented about it. Upon further reflection, it reinforced to me how teachers can be isolated and with limited support in the teaching of physical education for addressing HIV/AIDS. It emphasized the idea that teachers are largely left to their own devices and have to determine what is appropriate with limited access to resources such as supplemental teaching manuals. At the same time, the notion of creativity can be
understood as a form of resistance, as I have suggested earlier drawing Dart’s (2004) conceptualization of creative resistance. The response below illustrates this point:

*Interviewee J: The challenges could be that, maybe creativity in some of the activities that one needs to introduce, so that the sports can be partnered by some programs concerning HIV/AIDS, because one thing that I have observed is that you take the children there and only concentrate on physical education as a lesson, without knowing that you are supposed to partner/integrate other issues, such kind of stuff. So those could be some of the challenges, but as I said it is just the creativity of the teacher who is presenting the lesson. What kind of stuff do you feel you are supposed to introduce into the activities that the children are learning—really goes back to direction individuals may have received or their training [sic]*

It is far easier to be critical of what may not work particularly well, such as how teachers facilitate discussions and how HIV/AIDS is actually incorporated into physical education lessons. Focusing entirely on this aspect fails to notice how teachers are increasingly being asked to do more with less and in very difficult circumstances such as classrooms with more than 60 students. Further, the notion of creativity speaks to how teachers are negotiating their responses and fitting their actions to the demands of the school environment (McLaughlin, 1987). Training is only one aspect of these issues, and physical education must be linked to other interventions and HIV/AIDS. The very fact that a teacher is able to conduct a physical education lesson with limited resources and to manage more than 60 rambunctious and excitable teenagers is deserving of recognition and can be considered creative. Interestingly, none of the respondents considered the size of the classroom a challenge or problematic.

In reflecting on the need for creativity, it became apparent that most participants did not view or identify the pedagogy of physical activities and HIV/AIDS as a challenge, especially because the responses offered by interviewees were to the question, “In what ways, if at all, has the teaching of physical education as preventive education about HIV/AIDS been challenging or problematic?” It could well be that most participants are confident in their abilities and believe that the challenges in addressing HIV/AIDS through sport and physical education lie elsewhere. More realistically, however, it could be that the association between physical education and HIV/AIDS has been oversimplified, such that most teachers believe that training in physical education is sufficient for them to incorporate HIV/AIDS, with the real challenge coming in the form
of a lack of information on new activities that can be adapted to include HIV/AIDS education. The actual skill and pedagogy of physical education has largely been ignored. In considering what other issues participants remained silent on, it was informative that administrative support was not considered problematic.

5.6.4 Administrative Support

Almost all participants spoke of favourable administrative support and supportive teaching environments. While I did not doubt the sincerity of the responses, it is also customary within Zambian society to not be critical of senior management or elder members of society. In this regard I expected respondents to not want to be perceived as being critical of administrators. At times, this created awkward moments, as I was introduced to participants by senior management, with most interviews occurring not too far from the offices of the managers. Administrative support is particularly relevant in discussions about problems experienced, particularly as one administrator told me that physical education was “dead” in the school a day before I interviewed a research participant who spoke of a supportive administration. Further, after speaking about physical education being timetabled, I asked the teacher why the very large school timetable displayed in the staff room did not have physical education listed. The person responded that teachers were “still winning over the administration”. The support this particular respondent received came mostly from a lecturer at the teacher training college at which they trained and illustrates some of the notable contradictions in the responses offered by participants.

5.4 Chapter Summary and Conclusion

Participants’ responses suggest that HIV/AIDS is being integrated into physical education and that, increasingly, traditional games are becoming critical components for engaging students and for addressing HIV/AIDS. While the integration of HIV/AIDS is noteworthy, participants’ strict adherence to structure is problematic and runs counter to the themes of emancipation and critical consciousness that physical education and traditional games can facilitate. Additionally, the process of HIV/AIDS integration reveals that teachers are left to their own devices to determine what is appropriate, and often support for the implementation of or training on HIV/AIDS has not been forthcoming.
The teaching of physical education to address HIV/AIDS has indeed been problematic for all respondents. In particular, conformity to or the deviation from expected behaviour remains particularly problematic in both rural and urban settings. While teachers did not outright acknowledge the associated pressure of being role models, it was apparent in their responses that their standing in society remains sacred and thus requires an according lifestyle. Most respondents cited dress and attire as problematic. These responses point to a need to address deeper and historical social relationships, relationships that privilege boys over girls, and they are particularly loud on what is inappropriate for girls, while remaining silent on boys’ conduct. The discussion of what has proven problematic is quiet on the pedagogy of physical education, but one respondent offered what was perhaps the most insightful response regarding challenges, particularly regarding the creativity of teachers, which is best understood as a form of resistance to the dominant ‘banking’ style of education in Zambia. The respondent made a case for teachers’ creativity, something for which they need to be acknowledged by receiving further support.
Chapter Six:

Training in and Administration of Physical Education

6.1 Introduction

Prior to the inception of the research, I believed the training of or participation in workshops by respondents would be one of its key features, as would the identification of success stories and solutions to challenges faced by respondents in implementing the 2006 Presidential Decree. This belief stemmed from my observations and interactions with teachers, in which workshops and training were viewed as particularly useful mechanisms for the dissemination of new pedagogies and of information on physical education and HIV/AIDS. Certainly my own involvement in this sector has largely involved workshops and conferences, which remain a key feature in the international development arena.

In many ways I still believe this to be the case; however, after conducting my interviews and having spent time with education administrators, I believe that the training of teachers is only one part of the education system, a symptom and not necessarily a cause of some of the shortcomings in the development and implementation of the Presidential Decree noted in chapters 3, 4 and 5. If one focuses exclusively on the training of teachers, many other questions are left unanswered, as ultimately it is the education system as a whole that has to deliver on the goals of the decree. This chapter attempts to answer some of the previously unanswered questions by focusing on the support provided to physical education teachers by the education structure and on how this structure both stifles the work of teachers and remains a key component in the drive to attain education targets and deliver the HIV/AIDS preventive education message to the more than 1 million students enrolled in the Zambian state school sector. This chapter responds to the challenge of better understanding under which conditions desired outcomes may be achieved (Coalter, 2006; Donnelly, 2008, Giulianotti, 2004; Kidd, 2008). The approach taken is in line with Coalter (2006), as it explores other contributing factors, particularly around the issues of process, that is, delivery and implementation of the decree, and does not exclusively focus on outcomes alone.
This chapter draws in part on the work of Dyer (1999) who argues that to better understand the depth and complexity of policies within education one needs to identify key individuals and their activities, from policy development through to implementation, incorporating their local understandings and experiences of policy implementation into future formal policy evaluation and analysis. In this study, the key individuals are physical education teachers and senior education standards officers (SESOs).

In response to the question whether they had attended a workshop on the use of sport and traditional games to address HIV/AIDS, the majority of respondents claimed they had not. Most had attended separate physical education and HIV/AIDS workshops. This certainly points to a need for such combined learning opportunities. Given this reality, it should not be surprising to find gaps in the knowledge about the use of physical education to address HIV/AIDS (chapter 5), especially if one considers that some individuals learnt about the decree and the use of physical education in the fight against HIV/AIDS via the media and through word of mouth (chapter 4) and have not undertaken any professional development training in the area.

6.2 Individuals Significant to the Teaching of Physical Education in Zambia

Counting the number of people who have attended workshops is certainly useful, but, upon reflection, a more meaningful inquiry is perhaps to ask questions of the education system as a whole, shifting emphasis away from teachers only. How does the Ministry of Education roll out new teaching practices and information? How significant is the examinable status of a subject to decisions about the training of teachers? Who are the appropriate stakeholders (teachers, parents, curriculum specialists) who should drive this process? These questions are not novel and form part of long-held tensions within the education arena among key stakeholders, most notably between those charged with developing instructional materials (curriculum specialists) and those who implement (teachers).

For learning about the education system and its implications for the Presidential Decree, the frustrating hours spent waiting outside the offices of headmasters, SESOs and PEOs were perhaps the most revealing with regards to how individuals operate within this system and how power is exercised within its hierarchical structure. In this regard, I found the following exchange with a respondent particularly telling:
Researcher: Which person would you say is significant for you to be successful in teaching physical education? It can be any person from the school right up to the headquarters.

Interviewee Q: I think the PEO can do, but if it is at school level, the head teacher, because money does not come from the PEO, money is in school, so the head teacher is a significant person to support physical education. [sic]

I was not surprised by the respondent noting the power of the headmaster given the administrative control over school resources; however, I found the identification of the PEO interesting and wanted to know more:

Researcher: And why would you, initially you said the PEO, why would you say the PEO?

Interviewee Q: If for example, a directive comes from the PEO, in schools the PEO is respected more, even by the heads. So if a directive, even if you are going for a workshop if a directive comes from the PEO, it will be very easy for the head to release money for the teachers to go for that workshop. But if it is not there, you have the teachers pestering the head, it will be difficult. So he is the key point for the development of physical education in schools. [sic]

Researcher: If you had an opportunity or an audience with the PEO and they said they want to hear your suggestions on physical education, what would you tell the PEO?

Interviewee Q: I would tell them exactly what I have said here, that they are the key points in the improvement of physical education, in supporting physical education, with them just speak and once they have spoken the head, whether with or without money, they have to find money to support physical education. So if they say, find money as a school, buy these equipments for the physical education teacher, the school will definitely release that money because it is a directive. But if I, I go to the head and say give me money, he will not give me because I am not important as the PEO himself. So that is what I would say. I would urge him to support physical education by pestering head teachers to release money, because now each subject has money allocated specifically for that. Like in schools like high schools, there is even money for sports, sports falls under physical education, but you find that in schools where we are, we have no equipment for physical education. How do we improve sports when we do not do physical education because sports falls into physical education, it starts with physical education. For football, for us to win football it means we would have trained before and we have become so flexible that we cannot be injured, but if we say no physical education we will just be playing
netball, that is why most of the times we have injuries, why we have not been doing physical education? We shun physical education and we support sport. So we should make sure that we put sport and physical education together, let sport fall into physical education, so that it becomes one thing and they will see that even sport will improve. [sic]

I reproduce this lengthy response because it raises several issues that go beyond the significance of the PEO. Within a highly formalized institutional culture, the interviewee’s suggestion that they would tell the PEO exactly what they had told me went against my expectations, because individuals do not generally feel free to discuss information that may be viewed as critical of senior authority. In addition, the response suggests a distance between the PEO and the schools, specifically between PEOs and teachers. With PEOs regularly visiting schools, as I know they do from my experience waiting for them in their offices while they were doing so (chapter 3), the response suggests limited interactions with the PEO, so that the latter remains ill-informed about the state of physical education in the schools. It could well be that the capacity of the particular Provincial Education Office under discussion here has yet to develop to levels that lead to improvements in teacher motivation and overall performance, as Molefe and colleagues (2011) have discovered in district education boards (DEBs) post education decentralization in Zambia. Further, the self-perception of “not being important as the PEO” suggests internalized subjugation regarding a teacher’s significance in the delivery of education. Further, the respondent’s privileging of football over netball (not even regarding the latter part of physical education) is very telling from a gender perspective, as netball is largely considered a women’s sport in Zambia.

The interviewee’s response suggested almost two distinct spheres, notably the school and the Provincial Education Office, which physical education teachers have to be cognizant of and negotiate if they are to deliver on their teaching mandate. The response further suggests that two individuals have considerable power over how resources (financial and human) are utilized. I found it particularly insightful that in a teacher’s day-to-day work, the headmaster has a considerable impact on their teaching, but given the opportunity to identify someone significant to their teaching within the entire education system, the interviewee identified the PEO.
The response of the interviewee is particularly significant for the education sector because it gets to the heart of key reforms that have sought to devolve greater control over decision making and resources to schools. In this decentralized system, schools have more control over budgets to support school operations, including the purchase of equipment and the professional development of staff (attendance of workshops), based on the belief that schools would be more accountable and are better positioned to determine the needs of students and staff. The idea of PEOs having to “pester” heads of school to release funds for physical education runs counter to the policy of decentralization, under which these decisions are supposed to be made at the school level. The notion of having to pester heads of school also makes one wonder if this is the case for other subjects. Likely not, given physical education’s low priority and domination by other subjects on the school timetable.

It would appear that PEOs have significant influence on schools’ use of their resources, which supports Bennell’s (2004) observation that decentralization exacerbates political interference. It can be argued in part from the response above that as a result of these reforms, heads of schools have greater power and influence over resources than before, in a system that has theoretically enhanced checks and balances (school councils and parent-teacher associations) to improve quality and accountability in education. The response of the interviewee is significant because it underscores the need for the greater engagement of key personnel in the education system to mediate the considerable influence of individuals such as head teachers. This point is particularly salient in light of the comment about physical education being “dead”, made to me by a deputy head who was suggesting that I would have nothing to report on. If a teacher is motivated to teach but has no support from the headmaster, the PEO may be the only option to ensure that support is forthcoming. However, the system is such that an audience with the PEO is rare, and if a teacher ever expressed frustration over a lack of support from a headmaster to a PEO, this action may be construed as disrespectful and as challenging authority, with real consequences for the teacher’s career.

During a visit in August 2006 to inspect the implementation of the 2006 workshop outcomes in western Zambia, our group of inspectors came across a very supportive head of school and an equally motivated physical education teacher who had
by all measures made significant strides in implementing the workshop outcomes and the decree. During our meeting with the headmaster, the head shared how committed they were to the implementation of the decree, to the point that teachers who refused to teach physical education were made to leave the school and seek employment elsewhere. This approach may not be practical for all schools, and it certainly ignores information about the challenges of implementation, specifically about why individuals may choose not to teach or implement a mandate.

At the very least, the response by the interviewee suggests that both the head of school and the PEO should be engaged around the merits underpinning key mandates such as the 2006 decree, rather than, as in the current system, simply having circulars issued in the expectation that schools will simply follow the instructions outlined without any further explanations or advocacy.

6.2 Spheres of Influence and Moral Support

The identification of the PEO as the most significant influence was by no means universal among respondents, as some respondents identified lecturers from their teacher training colleges, the SESO, sports NGOs and PETAZ, suggesting that several spheres of influence affect the success of a teacher. A common thread among these spheres was the notion of moral support. Material support (administrative and financial), while important, appeared to be secondary to words of encouragement from peers and senior management. A phone call inquiring whether a respondent was teaching physical education and words of encouragement for continued instruction in the face of challenging teaching environments were more meaningful than material resources (e.g., books) and technical feedback on a teacher’s instruction. Possibly, teachers believed they were sufficiently knowledgeable about plus sport activities.

These spheres of influence around a teacher signify and reinforce the need to take a systems approach and to consider the bureaucracy that constitutes the education system. As discussed in chapter 3, the concept of social fields is useful for drawing attention to social relationships and to how they are structured by power within the bureaucracy. Physical educators and administrators can thus be seen to be in functionally interdependent relationships in which their thoughts and behaviours are circumscribed by
broader social networks with other teachers, governors, parents, and the Ministry of Education (adapted from Green, 2006, p.652).

The significance of a systems approach and physical education’s potential contribution in the government’s efforts to address HIV/AIDS become apparent when one considers that about 1.5 million students are enrolled in 3,700 state-run basic schools (Ministry of Education, 2010). The opposite, however, is also true: a limited appreciation of the effects of a bureaucracy and of the education system as a whole can erode the benefits of physical education by neglecting extant poor practices that may run counter to the “enhancement of values, skills and a holistic development of the learner”.

6.3.1 Agency/Structure in Physical Education

Within sociology, two distinct approaches are notable with regards to bureaucracies if one wishes to discuss an education system charged with implementing a directive like the 2006 Presidential Decree. The pertinent questions are, should the starting point of analysis be human behaviour (administrators, teachers) and its influence on the education system (agency theory), or should the analysis begin with the system and examine how it influences human behaviour (structural theory)? While these questions have been debated extensively in sociology and beyond, my experience in Zambia suggests that the country can ill afford to address one without the other; a meaningful analysis requires a joint focus on the education system and the personnel within it, as both are mutually reinforcing. Marxian analysis would support the synthesis of both agency and structure as applied to this study.

Weber’s (1978) characterization of a bureaucracy as a hierarchical pyramid of authority with levels of assigned distinctive jurisdictional areas, all of which are governed by rational rules and policies, is particularly relevant here. Noting that bureaucracies may not be entirely positive, Weber (1978) further notes that they create a new class of officials who exert inordinate power over their respective administrative areas and become domineering, imposing their own agendas upon their subjects. The response offered by the interviewee earlier puts the spotlight on the various actors (i.e., teacher, headmaster, PEO and SESO) and on the power and political dynamics at play in their everyday interactions within the education system. Upon reflecting further on my interactions with respondents, I concluded that teachers remain a key foundation of the
education system, while administrators are agents within the system who have the potential either to support and unleash or to thwart the ingenuity of teachers for the benefit of students. Bennell’s (2004) observations on the exacerbation of political interference and, by extension, of the regulation of teachers’ behaviour in the education sector are worth repeating. If one draws on critical perspectives, participants’ responses suggest a political and intellectual distance between implementers and administrators. This space has a considerable bearing on how teachers and administrators construct their identities in opposition to each other—“I am not important as the PEO”—while administrators with regulatory power are able to use their dominant positions to influence the behaviour and actions of those in subordinate positions in ways that maintain the status quo and hierarchies inherited from the colonial era.

6.3.2 Teacher Training

The 2006 Presidential Decree has, in many ways, exposed the vulnerability of an already weakened education system. Dyer (1999) offers a useful reminder that countries in the global South can ill afford to waste resources on poor planning and implementation. Resources (monetary, financial and human) used in teacher training can only be effective in the long run if teachers are adequately supported by the system once they are in the field. Having an education system should not be the end goal but the means by which education and broader development goals are attained through the support of key personnel within the system. Critical to this support is regular monitoring and the inspection of teachers, both of which are pivotal to educational quality and will become even more so, as I noted in chapter 2, with the switch of priorities from access to quality in Zambia.

Teacher inspection can be understood as an evaluation of the quality of the education provided, and it involves judgments about the overall effectiveness of the teacher in meeting the educational goals in his or her subject of instruction. These inspections can be intermittent, but generally a teacher should expect to be inspected at least once every two years. While the education system in Zambia has provisions for this kind of quality control through SESOs, limited capacities mean that not all subjects can be regularly inspected. As a result, non-examinable subjects rarely undergo inspection.
It was somewhat disconcerting to hear from interviewees that, of their chosen two subjects of specialization, physical education was rarely inspected. Some respondents noted that they had never been evaluated in physical education since leaving teacher training college, while they had been inspected in their other subjects of specialization. In some cases, this amounted to more than seven years without quality control in physical education. Knowing that one may not be held accountable or inspected can facilitate a negative response in teachers who may reduce the hours of their regular instruction or omit teaching practices that may be perceived as tedious but nonetheless contribute to quality instruction. In addition, if teachers are not inspected for prolonged periods of time, there is a genuine possibility of ill-trained teachers constantly reproducing their poor practices to the detriment of students and educational goals. When teachers are left to their own devices, they may rely more on a ‘historical/cultural script’ of how they taught physical education in the past, and that approach to teaching may not work as well for preventive HIV education. Just how does the education system evaluate the quality of teacher instruction if teacher inspection is at best intermittent? Can a teaching model based on faithful adherence to structure meet the contemporary demands of critical thinking about HIV prevention? Is such a model the ideal pedagogy for sport to address HIV? Clearly the subject matter in physical education has changed, but is the current ‘banking’ education system able to evolve and support a dynamic pedagogy that promotes freedom and critical thinking?

It is worth noting that during my follow-up visit to Zambia in 2011, when I sought feedback from participants on preliminary findings, one of the participants, a teacher, felt that I had been overly focused on the government and did not sufficiently hold teachers accountable for their role in the country’s current state of physical education. This response took me by surprise, as I had struggled with how teachers would be perceived by the readers of my findings. Of particular concern was that I would create an image of a physical education teacher who did not exert agency to change the somewhat poor circumstances of the school environment and had accepted these conditions to the detriment of education outcomes. I felt such a narrative to be akin to an agency explanation as argued by Donnelly (2003), which would lead to blaming victims and patronizing attitudes towards teachers.
The feedback provided by the participant challenged me to reflect if and why I
may be holding back critique of teachers. As I tried to problematize this particular issue, I
thought about my motivations for conducting this study and how my transnational
experience contributes to how I view teachers and other actors in Zambian education. As
noted earlier in the discussion of my positionality and transnationality, my motivation for
the research stems from a belief in sport’s and physical education’s utility in
development, and in Zambian education specifically. I considered my earlier discussion
about possibly being perceived as someone with a romanticized view of Zambia who was
disconnected from the realities on the ground and motivated by reinforcing an image of
the helpless teacher subjugated and dominated by an oppressive system of education
inherited from colonialism. At the same time I thought of the Zambian tradition of not
‘confronting’ or being critical of elders and individuals in senior positions and whether
this had an influence in my own assessment and reporting of the research findings.

Heeding Smith’s (1999) warning of the dangers of taking one’s views of one’s
community for granted, I was reminded of the influence of social justice in my views of
Zambia. Ultimately, the influence of critical social theory perspectives and the goal of
exploring broader social cultural structures meant that I focused much more on these
issues and on how the development of the decree in turn shaped behaviour. It could well
be that the participant and I drew from different interpretational paradigms, our
definitions of the unit of analysis thus differing as well. It is my contention that my
transnational positionality and critical perspectives provide uniquely nuanced insights
into the sociocultural and political environments in which the decree has been enacted.
Moving forward, I made a point of considering the consequences of overfocusing on
government structures, notably on criticisms about inadequate support and funding for
teacher training programs and patronizing attitudes about the structural circumstances of
teachers, without any real sense of how to involve teachers and administrators in
changing them (Donnelly, 2003).

The implication of this for my thesis and analysis was that I had to strive for
balance and to create a synthesis of the agency/structure dynamic. It is important that,
where appropriate, I do hold the various actors within the education system accountable.
It is far easier to lay singular blame at the feet of the education bureaucracy, but the
actions, or lack thereof, of actors in the system (such as teachers) should be pointed out, especially as teachers as a collective have not spoken truth to power with regards to teaching subjects that are not their specialties or that they have not trained in. This can and has contributed to the low standing of physical education within the education bureaucracy. Until recently, physical education’s key stakeholders have remained silent and unorganized in the face of education-sector reforms and the privileging of examinable subjects on the school timetable. PETAZ has been a welcome development for giving a voice to the physical education community and for encouraging the dissemination of teaching practices involving HIV/AIDS. However, it has yet to develop key competencies in political acuity and strategic foresight, and it remains woefully underfunded.

Perhaps even more disturbing is the response by an inspector confirming that they had not received any training for inspecting physical education, let alone the specifics of HIV/AIDS prevention through that subject. This comment was provided during a discussion about physical education training opportunities in Canada. Such a situation reinforces the problem that each individual teacher, regardless of how he or she learned how to incorporate HIV into physical education, determines the content and appropriateness of plus sport activities utilized in the teaching about HIV/AIDS. The significance of this can best be understood if one considers that a Zambian teacher receiving a day’s worth of instruction at a workshop on HIV/AIDS (or in some cases, not at all) is considered adequately prepared to teach the subject, while the education system as a whole is unable to verify the quality and accuracy of HIV/AIDS prevention education in physical education.

The use of one workshop for teacher training to introduce new pedagogies and strategies is not unique to Zambia, or to Africa, for that matter. In their report on teachers trained worldwide for the UNESCO, Schwille and colleagues (2007) note that “one-time workshops are commonly used approaches for in-service training whereby outside experts introduce new techniques and strategies” (p. 104). They argue that these onetime workshops are unlikely to result in changed behaviour or in the improved delivery of instruction, as the research indicates that these workshops are ineffective, inefficient and costly. Central to their argument is the observation that these onetime workshops are
usually held in isolation from larger educational goals, so that long-term improvements in teaching quality do not happen. This is relevant in the Zambian context, where NGOs increasingly fill the void left by government and provide training opportunities for teachers independent of the Ministry of Education. I will attend to this issue under the category of external stakeholders later in this chapter. Referring to Guskey’s theory of attitude and the perceptual change in teachers,\textsuperscript{14} Schwille and colleagues (2007) contend that teaching practice is unlikely to change significantly as a result of onetime workshop attendance, as teachers tend to have strong ideas about which kind of practices will work for their students and which will not. Elmore (2002) argues that these strong ideas are formed from experiences, personal values and knowledge, pedagogy and content, and as such it is well-nigh impossible for an isolated workshop to make a difference (p.18). Elmore (2002) concludes that working with teachers directly on instruction, and over an extended period of time, “is probably the most potent form of professional development available to schools” (p.19), which is relevant to the 2006 Presidential Decree and its implementation.

Elmore’s (1979) seminal work on policy implementation provides a useful reference for analyzing the challenges of teacher inspection and the associated effects on the quality of education in Zambia. Elmore (1979) argues that the challenge is not to determine where a government should allocate resources but to understand which individuals in the policy-implementation process are closest to problems and what resources they need to address them. When asked, “Which person would you say is significant for you to be successful in teaching physical education?”, respondents noted two or more individuals, but the majority identified the SESO. This is ironic given that this is the individual charged with inspecting their subject and who, in most cases, had not done so. The role of the SESO is critical for ensuring quality, but often the SESO has not been trained on how to inspect physical education or HIV/AIDS prevention in physical education. Participants said the SESO occasionally called to ask if they were teaching physical education. In instances when the SESO was at a school inspecting

\textsuperscript{14} The central argument underpinning Guskey’s theory is that practice changes attitudes, and not vice versa. In Schwille et al., 2007, 104.
another subject, he or she would also ask interviewees if they were teaching the subject. This counted as inspection.

Most respondents cited the moral support received from the SESO as significant in ensuring that they implemented the mandate. Still, little institutional effort was made to make sure that not just any physical education was being taught, but a quality physical education that complemented the governments’ education goals and preventive education mandate. Using Elmore’s (1979) approach, the SESO would appear to be closest to the problems of implementing the 2006 Presidential Decree at the school level. At the same time, it appears as though the government of Zambia is satisfied with the mere existence of an education system and does not in practical terms view the system as a means to address education-sector goals and mandates such as the 2006 decree. Having personnel in key positions is satisfactory to the Ministry of Education; however, where physical education is concerned, and in particular the 2006 Presidential Decree, the quality of instruction and its monitoring are not supported, and they certainly do not match the rhetoric of the decree.

It’s also worth noting that physical education teachers are equally close to the problems of implementing the decree. As I have discussed earlier, the inability to teach and demand the minimal standards of education delivery (teacher inspection) contribute to the low standing of the subject in schools in which the decree is meant to be implemented. Paradoxically, the lack of a training and support strategy for the decree can undermine physical education’s inclusion in addressing other broader curriculum targets. Experience from Canada and other countries indicates that those with a sport background are much less interested in and capable of including all students and broadly based programs. As noted in chapter 3, most participants did not indicate a history of involvement with sports prior to teaching, with the exception of a participant who benefited from a sports scholarship and who competed in athletics. Additionally, while teachers specialize in physical education, they do so later in their training. However, the responses and discussion around the use of physical education and games for HIV/AIDS prevention in chapter 5 point to an uncritical acceptance on the positivity of physical education and to the perception of physical education as practice or, put simply, to the existence of a sporting ideology (Green, 2006, in Velija et al. 2009, p.13). The
implications of these particular perspectives are worthy of future studies, but if physical education teachers are shown to not adequately include broader societal issues in their classes, this may further marginalize the subject.

El Salvador provides some promising signs for countries such as Zambia from its experience of revitalizing physical education to develop life skills and to address conflict resolution as illustrated in the programme summary in figure 6.3.2 below.

**Figure 6.3.2 Scotiabank Salud Escolar Integral (SSIE)**

Source: Centre for Healthy Development through Sport and Physical Activity, Brock University, [http://www.fahs.brocku.ca/chdspa/SSEIEng.html](http://www.fahs.brocku.ca/chdspa/SSEIEng.html)

**Objectives**

1. To use sport, play and physical activity to teach life skills, especially conflict resolution, in primary and secondary schools.
2. To build the capacity of local teachers to deliver inclusive, child-centred and developmentally appropriate lessons through in-service and pre-service training.
3. To support El Salvador's Ministry of Education in redesigning the national physical health and education curriculum to promote holistic child development and healthy choices.

**Program Design**

The Centre for Healthy Development through Sport and Physical Activity initiated Scotiabank Salud Escolar Integral (SSIE) in 2005 to empower current and future teachers to use physical education to promote a new vision for children’s health and to teach life skills, especially non-violent conflict resolution. The program was expressly designed to be part of the school system in order to maximize reach to youth under 15 and to leverage the school system's ready network of 50 000 teachers.

**Delivery & Implementation**

1. Ministry of Education El Salvador (supports SSIE workshops and collaborates on reform of school curriculum at all levels)
2. Pedagógica University (trains physical education teachers and adopts new curriculum in 2007)
3. Canadian Embassy in El Salvador (provide networking support and connections with local partners)
4. Plan El Salvador (active in rural areas and provides network for project)
5. Youth Secretariat (government agency dealing with youth, supports SSIE efforts in schools)
Impact

1. In 2006, 11 workshops for over 800 in-service and pre-service teachers were held. 15 workshops were scheduled for 2007 targeting approximately 1000 teachers.
2. SSIE staff report that teachers are highly motivated, even willing to attend training outside regular working hours.
3. In 2007, Universidad Pedagógica de El Salvador launched three-year physical education training program with 52 prospective teachers.
4. In 2005 and 2006, one school was selected to pilot sports demonstrations with students. Six visits were held at this school, involving 370 students. In 2007, approximately 5 presentations were scheduled, reaching approximately 500 students.
5. SSIE has had a positive impact on school attendance. Though the program does not yet have the capacity to monitor this numerically, anecdotal evidence from teachers and parents indicates that students are much less likely to miss school when they know a physical education lesson is scheduled.

Lessons

1. Physical education can teach a wide range of vital life skills, such as cooperation, team-building and fair play.
2. Important team-building skills can be learned through team sports like football, provided that these sports are well-mediated to impart these lessons. SSIE has had great success focusing on games and activities, rather than sports, partly because players have no preconceived notions about goals or strategy when the game is unfamiliar.
3. It is important to create broad-based partnerships with diverse groups. SSIE involves universities, government bodies and NGOs, as well as teachers and teacher trainers.
4. Listen to local needs and orient project activities to solve problems identified by participants.

I reproduce the program summary of the Scotiabank Salud Escolar Integral (SSIE) as it provides useful lessons for the current study and some evidence of physical education teachers’ ability to include all students and teach broadly based programs. El Salvador’s experience teaches important lessons about the sustainability of such interventions given the involvement of donors, but also about the need to pay attention to teacher training if issues such as conflict resolution are to be addressed by the education sector. These lessons and this study’s results suggest a need for caution and for unrushed implementation. Careful attention is needed in future teacher training.
6.3.3 Inter-Ministerial Collaboration and Support

In speaking with education administrators (at the CDC, headquarters, PEO), and through my previous experience working in Zambia, I got the sense that working in silos was the norm for government agencies, particularly concerning the curriculum. During my follow-up visit in 2011, I held a number of meetings at the CDC. On one such visit, I found curriculum specialists working on a new curriculum on physical education and facing the challenge of not having updated resources on health and physiology to include and reference in the new curriculum. I was asked to contribute to these discussions; however, not being an expert in health or physiology and finding it inappropriate, I declined the offer to participate. I suggested that they contact the Unit of Physical Education at the University of Zambia, as I was part of a Canadian non-governmental agency that donated textbooks to the Department of Economics and the Unit of Physical Education at the university, and included in these donations were texts on physical education, health and well-being. While the specialists appreciated this suggestion, the pressure to complete the draft meant that they were reluctant to call or visit the University of Zambia. So I drove less than five kilometres there and asked for a few textbooks, returning to the CDC about an hour after I had left. This particular incident spoke to the challenge of working in isolation and not going outside one’s familiar background. If the physical education curriculum specialists with very close ties to the university are not aware of the existence of such resources and are unable to work within the physical education community and ask for assistance, it is difficult to imagine how they can work across ministries with the health ministry. I should note, too, that when we originally donated the text books, the shipment of both economics and physical education books was received by the Department of Economics. It took more than six months for the Unit of Physical Education to get the books, because the Department of Economics had not informed the unit of the books’ arrival. The two offices are about 500 metres apart. Working across departments or ministries seems to be a challenge, even when it involves notifying another department about the possibility of picking up an order of donated books.

Such instances underline the need for an examination of the interaction between the education sector and other government agencies such as health. There is a need for
government agencies to work more closely together; in this case, involvement of the Health Ministry could support curriculum and teaching standards to ensure that overall health objectives are not being undermined, particularly as HIV/AIDS is a designated national priority and continues to affect the majority of the population. Closer ties could reinforce the urgency of addressing particular issues. The more institutions work in isolation, the more they are likely to revert to traditional or long-held challenges in their particular field.

A notable example of this, which I fell victim to, is how the subject of HIV/AIDS was eventually subsumed by the narrative on teacher training, the examinable status of the physical education and relationships among teachers, SESOs and the PEO. These issues are not new, and a lasting solution is needed to ensure favourable education outcomes. However, lost in this narrative is how the education sector is contributing to addressing HIV/AIDS: How effective have teachers been? Is the current pedagogy of HIV preventive education appropriate for Zambian students? Do teacher training colleges adequately train teachers in life skills and HIV/AIDS? And how complementary to and consistent with Zambia’s HIV/AIDS policy is the HIV/AIDS education in Zambian schools? These are all important questions that unfortunately do not get the necessary attention and evaluation they deserve. I certainly fell prey to this shift from a central focus on HIV/AIDS to other challenges experienced in the physical education community. As I reflected on this reality and its implications for the present study, I was reminded of the narrative of so-called AIDS fatigue, which asserts that over time, images and stories of the earlier and devastating stages of AIDS are not as influential and that individuals have increasingly become disillusioned by the safe-sex message. As more people are able to access life-saving drugs, is AIDS as significant an issue for Zambians? Given the gender and poverty dimensions of AIDS (which I attend to in chapter 7), I believe HIV/AIDS prevention education remains significant, and now more than ever, government agencies need to work together in a way that reinforces and complements national HIV/AIDS policies. Striving for AIDS-free generations in light of the experiences and information gained throughout the years is still worth pursuing.

Lastly, it is worth asking if expectations for the decree vis-à-vis its impact have been unrealistic. Werner’s (1990) argument for an appreciation of the uncertainty
associated with curriculum implementation is worthy of reflection here. Werner (1990) argues that the curriculum is one of many influences on the classroom, including the schools’ resources, priorities, leadership and socioeconomic context. As discussed in previous chapters, the lack of a detailed plan of implementation undermines the expectations for the decree and can be argued to be unrealistic.

6.3.4 External Stakeholders

In this scenario of a bureaucracy that mandates but does not necessarily provide resources and conduct evaluations, the role of external partners is significant, as they have increasingly become major support networks for Zambian physical education teachers, particularly for those in rural areas, where limited access to books, journals and other physical education teachers puts them at a disadvantage. Yet the work of external partners in this scenario is both commendable and problematic.

By way of example, International Inspiration15 is an international legacy program for the London 2012 Olympic and Paralympic Games led by the UK government. Launched in 2008, the program aims at transforming the lives of 12 million children of various age groups and abilities in schools and communities in the global South through sports. In its first year of operation, the program piloted in five countries: Azerbaijan, Brazil, India, Palau and Zambia. In its second year, seven countries were added to the program: Bangladesh, Ghana, Jordan, South Africa, Mozambique, Nigeria and Trinidad and Tobago. In Zambia, the program was involved in a number of projects, which included providing support to schools and teachers through the provision of teaching materials and working with the CDC. The work of International Inspiration is commendable for the pedagogical and material support lent to teachers, in particular the exposure to other physical educators from the United Kingdom. The program has allowed teachers to benefit from workshops that address not only HIV/AIDS but also current Zambian practices of teaching physical education. Such programs have the ability to bring together not only those in the physical education community but also stakeholders from other government ministries, enabling departments and agencies to work within and across their own territories.

International Inspiration is also problematic, however, for a number of reasons. First, the program is not indigenous, which raises concerns about its understanding of Zambian physical education and sport culture, history, subtexts and the sustainability of International Inspiration. As noted earlier, the legacies of colonialism are such that traditional languages and games are marginalized in the school setting in preference for the official English language and imperialist-in-origin sports such as football. Second, as of 2011, funding for Zambia has expired, with program activities winding down to a close, raising the issue of the sustainability of such programs. Third, perhaps as a legacy of colonialism, the work of non-Zambian and international programs such as International Inspiration is often privileged and more valued by Zambian politicians and administrators at the expense of Zambian initiatives. Programs like International Inspiration are likely to reassert the domination of traditional languages and ways of knowing with the complicity of the Zambian leadership. The consequences could be dire, much as those described by Mukanga (2012), who warns of China’s new colonialism in Africa. Within Zambian society, there is a tendency to privilege non-Zambian individuals, particularly Caucasians, and organizations, to the extent that Zambian ideas and organizations may be perceived as inferior. Fourth, programs such as International Inspiration are funded on the basis of agendas that have nothing to do with Zambia. In this particular case, International Inspiration was part of London’s 2012 Olympic bid, as discussed in chapter 3. Few in the physical education community in Zambia are able to make a connection between London 2012, the revitalization of physical education in Zambia and sports camps in Azerbaijan. These problems are further exacerbated by smaller international SDP organizations that do not have the burden of a bureaucracy, or the associated accountability, so that they are able to enter schools and conduct some training without long-term commitment. This raises the need for greater coordination among stakeholders, and in particular among SDP organizations, as Kidd (2008) has argued.

As important as the work of international programs has been, what has consistently remained underestimated by the Education Ministry, and to some extent by international SDP organizations, is the role of indigenous Zambian organizations such as Edusport and Sport in Action in supporting teachers across the country. Part of this
underestimation rests with the inability to fully recognize the legacies of colonialism and their resulting relations of power. Because of these, actors from the global North are perceived as relatively more knowledgeable, with better resources (financial and material) to implement projects. In recent years, the indigenous organizations have widened their networks of influence beyond community programs by working with schools and by providing sporting equipment, after-school programs, teaching materials and regular training opportunities for physical education teachers. In a sense, these organizations have become a proxy of the education system with regards to physical education. Interviewees regularly cited these organizations as champions of the use of physical education and sport for addressing HIV, of the revival of traditional games and of ongoing support to teachers through the supply of reading materials and training workshops.

As influential as these organizations (international and local) may be, their role in supporting state-sanctioned initiatives such as the Presidential Decree needs to be more carefully and critically considered. Should grassroots community organizations be training public sector teachers? What role does an organization like Edusport have relative to International Inspiration? If the education sector is considerably challenged, should solutions be contextual and drawn from organizations that are situated in the communities in which they operate, rather than from non-Zambian organizations? Additionally, how are issues of power and race addressed in these relationships? Echoing previous research (Giulianotti, 2004; Darnell, 2007), I think that more work remains to address the cross-cultural politics and the dynamics of power between donor and recipient groups in sport for development, and in indeed the wider development arena, despite the oft-proposed universality of sport. In previous chapters I referred to the relative acceptance of British physical education at a workshop I attended during the pre-research phase. I considered acceptance as a rather passive form of participation by Zambian workshop attendees. Gregory’s (2000, p.186) problematization of participation is relevant here, given what I believe to be an unhealthy imbalance of power between facilitators and workshop participants during the presentations of the British model, which served to reinforce ingrained tendencies towards dependence on external sources of expertise, and the inability to recognize sociocultural barriers to participation tensions
between curriculum specialists and teachers seemed to be of more immediate concern for the teachers and representatives from CDC. Researchers have argued that sport for development is more than a reflection of traditional development aid, as it consists of sets of relationships that are produced by social actors interacting with one another. It would appear that this equally applies to donor relations in the field of physical education. At the same time, it is important not to oversimplify these tensions, as the challenges are complex and not simply reflective of a North-South dichotomy. Interactions among domestic organizations and their response to the issues of HIV/AIDS and the social context in which they operate require special (or equal) attention.

At the macro level, the growing influence of external organizations such as International Inspiration should be considered in assessing the delivery of public goods (education), the effectiveness of public policy and the reduced role of the state. Education has been argued to be the bedrock of modern democracies and essential to an informed citizenry (Caledon Institute of Social Policy, 2000). While these external organizations are making key contributions to enhancing the delivery of physical education in the country, the inability of the state to monitor and outline a standard or principles for external stakeholders greatly undermines the quality of physical education received by enabling an environment in which education outcomes are largely influenced by a teacher’s interaction with stakeholders who themselves determine the terms of their involvement with teachers and schools.

A possible solution to the challenges noted here is to formally recognize stakeholders, so that all SDP organizations working with teachers and schools meet formal requirements outlined by the Ministry of Education as a way of leveraging stakeholder experience in the delivery of community sport programs and of increasing resources for the physical education community. This would further validate and strengthen the education system. The challenge is to ensure that the Education and Health Ministries collaborate on HIV/AIDS education and that the system delivers regularly inspected quality education, with excessive powers of influence diminished and associated sociocultural politics brought to the fore and addressed. In seeking the regulation of external stakeholders, consideration should be given to sustainability, appropriateness, the role of traditional games and an acceptable quality of physical
education. Even though it would add another level of bureaucracy, organizations both local and international should be vetted (e.g., by the Ministries of Education and Foreign Affairs) and meet minimum SDP standards to be able to work in Zambian schools.

The process of vetting organizations is nothing new. Within the sports sector, governments work with identified sporting organizations and provide support to national teams through those organizations. For an organization to be considered a national sport organization, a number of conditions have to be met; a similar approach with a licensing fee can be adopted for stakeholders working with government teachers and schools. Revenues generated from fees could be used to supplement the training of SESOs and teachers. Such an approach utilizing SESOs can play a tremendous role in informing not just the Zambian education sector but the entire sport for development community.

6.4 Chapter Summary and Conclusion

The responses offered by participants suggest a poorly implemented training program for teachers where the incorporation of HIV/AIDS in physical education is concerned. Where training does occur, it is often ad hoc, and the research reviewed suggests that this limits the training potential to have a meaningful impact on educational quality. The role of the SESO also appears problematic, as much rests on this individual, while the realities of his or her work limit the capacity to adequately address all the demands. These limitations have opened the way for external stakeholders to act as proxies of the education bureaucracy, which can be problematic, as these organizations often determine the terms of their involvement with less than adequate input from the government.

Given the issues raised in this chapter, bureaucracies can be viewed as a hindrance and as stifling teachers’ creativity, a creativity that is essential to the development of students. However, my observations and time spent in schools also lead me to believe that a lot can be still be achieved through the education system. There is evidence that the sector can be innovative and ahead of current practices within education. Schools are consistently being asked to do more with less, and teachers are finding innovative approaches to engage and teach large classes with limited equipment on a daily basis. Because of the sovereignty afforded to schools and because of
socioeconomic circumstances they find themselves in, schools can be venues for remarkable developments.

By way of example, one of the research participants I interviewed is a teacher trainer at a special needs college. After attending the 2006 workshop and returning to the college, the participant has gone on to teach persons who have specialized in working with students with special needs within the field of physical education. Mainstreaming or integrating into regular classes students with special needs is the dominant practice in Zambia at the moment. Given the demands on school resources and the congested school timetable, students graduating from the special needs teaching training college are increasingly reporting that they have had to adopt more inclusive practices, with both special needs (mild/moderate disabilities) and non–special needs students participating in their physical education classes. While this was certainly not planned, there is growing evidence that inclusive practices can and do work in the Zambian setting. Teachers share stories of success with regards to the educational development of those with special needs, speak of the increased integration of students with special needs into the daily routines of schools and have evidence of diminishing discrimination in school environments. As Dyer (1999) argues, incorporating such local understandings and experiences of policy implementation would greatly benefit future policy evaluation and analysis.
Chapter Seven:

The Decree as an Enabler of Teacher Voices and Shifting Gender Relations

7.1 Introduction

The experiences of teachers and administrators and how they talked about the decree suggests a new era for physical education and traditional Zambian games in which school settings can be conceived of as sites of cultural transformation and as spaces within which teacher voices have come to life. Here I use Merleau-Ponty’s (1962) description of space: space is thus regarded as the means by which the position of things becomes possible, rather than being the setting (real or logic) in which things are arranged (p.243). These spaces can also be regarded as sites of cultural transformation with regards to observed changes in the classroom dynamics between boys and girls, as students interact much more than they have in the past. The space between the school setting and the Provincial Education Office (and administrators) seems also to be shortening as a result of the Presidential Decree, which leads to greater feelings of empowerment for teachers. This was expressed in the narrative of how physical education has been re-legitimatized on the school timetable and how senior government officials, including the country’s president, had devoted their time to the subject of physical education. How these ideas have been translated in the implementation of the decree remains far from the vision promoted by the rhetoric, but one cannot underestimate the significance of the decree to teachers. This significance has largely meant a greater voice for individual teachers and an administrative prop (the written document) that teachers can stand on and refer to in the face of entrenched institutional and social customs that continually sideline physical education, even with the subject’s display of creative and progressive practices. The decree has not only enabled teacher voices to be heard but has also led to the emergence of new gender relations in the classroom. In this chapter I aim to elaborate on some of these initial successes, which need to be celebrated, further evaluated and replicated across the country.

The responses of participants indicate an awareness of equity issues such as fair play and the inclusion of people with disabilities within the physical education community; a growing sense of empowerment among teachers and students; and
changing gender relations in the classroom. The discussion with participants about gender was perhaps the most challenging for me, as I did not feel adequately trained in how to address the topic; I also did not think myself in a position to make a meaningful contribution to the role of physical education and sport in advancing gender relations, although this has changed with my engagement with these issues during my research, in the process becoming more confident about my contribution to this to this topic. My discussion with participants had to go beyond the numbers of girls or boys participating in a classroom or program, which unfortunately continues to dominate most discussions about gender in mainstream Zambia. I found this frustrating, and at times I was unable to move the discussion beyond numbers and onto the perspectives, roles and responsibilities of both males and females (Sancar and Sever 2005). Of note is the lack of a significant number of female role models that are brought to the attention of Zambian society, and the question is how women teachers can address this with regards to being exemplary by having employment and succeeding in the male-dominated sport and education sectors. In previous chapters I referred to the work of Bajaj (2009) as an exemplar of the significance of female role models to young girls. The HIV/AIDS preventive education component of my study further necessitated the need to discuss gender, as it remains central to understanding factors that exacerbate the disease and to how meaningful and effective responses may be developed.

7.2 Feelings of Empowerment

Empowerment can mean many different things to different groups and individuals, and it has been studied in a range of disciplines including anthropology, economics, medicine and psychology, to name a few. Rappaport (1984) has noted that it is easy to define empowerment by its absence but difficult to define in action, as it takes on different forms in different people and contexts. The World Bank considers empowerment as the expansion of freedom of choice and action (World Bank, 2003). Generally, empowerment refers to increasing an individual’s or a community’s capacity (e.g., educational, social, political), with greater confidence in using those capacities as an outcome. Page and Czuba (1993) provide a useful conceptualization of empowerment by noting that it is a multidimensional social process that helps people gain control over their own lives. It is a process that fosters power (capacity to implement) in people—for
use in their own lives, in their communities and in their society—by acting on issues that they find important.

7.2.1 Teacher Empowerment

The responses given by participants suggested an increased level of belief and confidence in physical education. The empowerment that respondents spoke about suggested that the organizational capacity of the physical education community has been strengthened by the introduction of the decree, so that individuals are now able to take action in their day-to-day environment, addressing the challenges they face. Kabeer’s (2001) definition of empowerment is relevant here. Kabeer (2001) defines empowerment as “the expansion in people's ability to make strategic life choices in a context where this ability was previously denied to them” (in Malhotra, 2003, p.3). Malhotra (2003) explains the significance of this definition as it contains both process and agency elements and implicitly distinguishes ‘empowerment’ from the general concept of ‘power’, as exercised by dominant individuals or groups (p.3). Using this definition, one can argue that a progression of sorts has occurred in the physical education community with the subject being legitimatized by its appearance on the school timetable and with agency being exemplified through the physical education community inviting the president to the 2006 workshop, the skit performed there and the continued reference and resistance to existing dominant, suppressive practices exercised by administrators. A consequence of this has been the shortening of the historical distance between teachers, school headmasters, SESOs and indeed the PEOs. In chapter 6 I acknowledged this distance in the responses offered by a participant, but responses to questions on gender and other aspects of the research reveal that this distance is shortening. Teachers can now pick up a phone or visit the offices of senior administrators confident that reference to the decree will at minimum result in their views being actively listened to, which was not the case historically. Given these changes, the decree has not only improved physical education in the country but has also empowered the physical education community.

Physical education teachers can now walk with their heads held high, as being a physical educator is no longer a cause of shame or a sign of failure. In the past, wearing a tracksuit to school would elicit ridicule among fellow staff members. The decree, at least in the education sector, has raised the profile of physical education and enabled physical
educators to teach the subject for which they have been trained. In this sense, the recent institutionalisation of sport for development within Zambia (and more broadly) is a significant development and one that now has an impact in school settings.

The following responses illustrate just how the decree has contributed to greater feelings of empowerment and as result has enabled the voices of teachers to be heard in school settings and in the education sector at large.

**Interviewee N:** It is a very good decree. It is a good decree because it has helped us really to bring back the physical education which had died and introduction of physical education in high schools and colleges, so it has really brought more good than harm. [sic]

**Interviewee E:** The major changes, I think would be that, previously I did not look at it as a subject that would be appreciated even at the level of the president. But after the decree I realized that if the government is able to appreciate that PE is an important subject, then it means this nation is headed for development.... [sic]

**Interviewee L:** I teach with more interest now than before. Now I can do the theory and the practical part other than before I would just take the pupils for physical education may be some information would be remaining, but now I have to bring out all the information and give to the pupils. [sic]

The responses above suggest that the decree has legitimized the subject of physical education and that this has raised the morale of individuals. It can be demoralising to be trained in a subject that not only the school but the entire education sector fails to care about or regards as insignificant to the development of the learner. Sadly, even peers in the staff room, who one should assume would appreciate the time invested in a teaching
diploma, have contributed to the demoralisation of physical education teachers through ridicule and their lack of support for the subject’s inclusion on the school timetable. It is also very telling that one of the participants confirmed in their response that until the decree was enacted, the omission of several aspects of physical education instruction was commonplace. As I have mentioned in chapter 6, the omission of certain aspects can lead to the perception of physical education as practice at the expense of a broader conceptualization of the subject, one that is able to engage critically on social development issues. Evidence of the inability to adequately engage with these issues can further marginalize the subject in terms of its potential contribution to the attainment of education sector targets.

7.2.2 Student Empowerment

It was interesting to hear from participants that the feelings of empowerment extended to students as well, who now demand to be taught physical education. The students cite the decree, noting that it is compulsory and should be taught. Students make these comments when faced with changes in schedule, as when teachers are considering giving more time to an examinable subject. It could well be that students simply enjoy playing games and that the reference to the decree is a way of getting out class. Even so, this should be celebrated, as students have an avenue to express themselves and have found something enjoyable on the school timetable. This is particularly important for the use of sport and physical education in HIV/AIDS prevention, because when children and youth enjoy participating in games, it facilitates a non-threatening environment in which taboo or difficult subjects about sexuality can be discussed. Indeed, interviewees consistently noted how the inclusion of traditional games within lessons engaged students by allowing them to identify and incorporate HIV prevention messages into local knowledge. In this regard, traditional games are becoming critical components in how teachers engage students to learn about HIV and AIDS both in and outside the classroom. As such, traditional games are gaining considerable social capital and challenging dominant non-Zambian games such as football.

The following exchange illustrates the increasing demand by students for more physical education classes:
Researcher: Now focusing on the Presidential Decree and the school, how is the Presidential Decree important for this school and the students?

Interviewee H: Actually, this one is very important. You know that in the past physical education was taken very lightly. You find that when you go to a school, for example here, you would only maybe teach for the sake of teaching. But after the Presidential Decree everybody took it seriously, even our administrators they took it seriously just here in the school. They said let us have physical education, all the pupils should learn physical education. So we have seen a situation whereby even the pupils themselves have come to appreciate it. Even the teacher, you are busy, you are in class, they will come and say, sir, it is time for PE. So you see that is how important it has become. Even the pupils themselves they know that this is a teaching subject, we have to go for PE. The only problem we have is the afternoon pupils, which we call the APUs, those are the people who have problems because we don’t teach them because their timetable is too short, that is the problem we have in the school. [sic]

Researcher: And in terms of how many times you were teaching physical education at this school before the Presidential Decree and after, has any of that changed?

Interviewee E: I wouldn’t say, but the difference is that before the decree was made, that is the time I was teaching the primary section. And in the primary section the timetable is different from the upper basic section. After the decree I started teaching in the upper basic section where I only had one lesson with each class on my timetable per week, unlike when I was teaching the primary, I had two lessons per week and that enabled me to have regular physical education lessons. Though I would not say I was very consistent such as to make it every time. Sometimes I was missing but when I started teaching the secondary section I had to make sure, because it was only coming once a week and so, even if you were busy the pupils would be there, saying sir we want to go for PE, it is PE time, let us go. [sic]

The above responses are illustrative of the decree’s impact. Whereas in the past teachers
could omit physical education classes without consequence, the decree has placed some pressure on ensuring that the subject gets taught, and, crucially, students have been given voices. The responses noted above also raise concern about the availability of physical education for students in the Academic Processing Unit (APU). The APUs were established in 1996 to offer more places for pupils who otherwise would not have had the opportunity to attend regular classes. They were initially designed for students entering junior high school in Grade 8. APU classes are usually taught in the afternoon, and students are required to pay school fees, with teachers receiving extra allowances for teaching these classes. APU classes have contributed to increased access to education in Zambia.

It is worth noting that key questions remain with regard to how and whether empowerment through sport is significant in enabling individuals to overcome the challenges of poverty and unemployment. More work is needed in this area as feelings of empowerment in the school setting, if not connected to the socioeconomic context in which individuals live, will remain just that—feelings. I refer to these issues in my discussion on the tendency to oversimplify the conceptualization of how Zambian physical education can address HIV/AIDS. Sport for development and the development arena are replete with research studies that demonstrate that individuals feel empowered after an intervention. If this empowerment is to mean something, individuals must be able to act on these increased feelings of empowerment in a way that enhances their material and emotional well-being. Given the interest in the sport for development arena, and by extension in the physical education and traditional games community, it is incumbent on all practitioners to ensure the beneficiaries are truly empowered and enabled to overcome poverty and unemployment.

7.2.3 Role Models

The limited number of accessible and visible female role models and their increasing significance beyond the physical education community is an area deserving of attention. The International Sport for Development Platform (2001) notes that research has shown that most girls learn “culturally-appropriate styles of movement by imitating their older female counterparts … but communicating the achievements of those exceptional women to others remains a challenge.” The few female physical education teachers that continue
to make considerable strides in a male-dominated sector and a patriarchic society should be celebrated and supported.

Respondents shared challenges they faced in operating in rural areas where social customs were particularly strong, to the extent that parents complained and demanded for physical education not to be taught to female students. Faced with unsupportive school administrators and rare interactions with the SESCO on physical education, one participant continued to advocate and teach physical education. Over time, parents in the surrounding communities seem to have come around and begun to see the benefits of participation in sports and physical education, relenting on their objections. Another female respondent shared the pride of being both a female physical education teacher and a sports master at one of the Ministry of Education’s show schools. When new policies or initiatives are being launched or tested, the respondent’s school is usually chosen because of its location and the size of its student population. Speaking about her experience as a teacher and an influence on female students, a respondent provided the following response:

*Interviewee E: Physical education is good in all ways, it can develop you mentally, spiritually, emotionally and so forth, so keep on doing this subject and the children got interested. I am telling you that I have not gone very far, but this is a sporting school. Our high school is a sporting school. I encouraged more the girls, because they did not have interest towards the subject. But when they saw me, they saw me as a model. They always talk about me. And they gave me a name, “Active Teacher”, so when you come here you ask, who is ... the active teacher? Because I used to go from class to class telling them the importance of physical education. So now the head has also motivated me by putting as a sports coordinator, as a lady, in this big school. So I was more motivated and I actually just do my best so that I see the school promoting the same physical education in the school. So we started doing sports seriously and also teaching PE. [sic]*

This is a highly symbolic achievement that should be recognized. Unfortunately, even within PETAZ, such achievements go unnoticed by the male-dominated leadership, as they do in the Zambia National Union of Teachers (ZNUT). Perhaps it is too early in the
development of physical education in Zambia to have an organization that focuses exclusively on females in sport and physical education, such as the Canadian Association for the Advancement of Women in Sport (CAAWS), given the limited resources, but this is certainly needed. It is perhaps inevitable that such a chapter will emerge, especially as more female physical educators return from training scholarships in Canada and the United Kingdom.

A lot can be learned from these female physical education teachers with regards to excellence, commitment, perseverance, and how to overcome and address significant challenges. These are virtues of sport that are often celebrated and argued to build strong character. Rather than castigating such individuals and not providing support or acknowledging their contributions, the education system, PETAZ and ZNUT should further expose such individuals to more students, particularly to girls. I found the following responses by a respondent particularly enlightening of the impact some of these teachers are having. Responding to a question on why the administration and the local community in a rural town had become more supportive of the teaching of physical education, a participant offered the following:

Researcher: What has changed, why have people changed and become more supportive than they used to?

Interviewee L: I think looking at the change of behaviour of the pupils, it has made them change. Because you find pupils did not have an activity to do, all they would do is roam around the streets and around bars, in the evenings you would find them in bars and things like that, but as for now you find there no pupils there, maybe they are busy, maybe you have given them a project, so they are busy at home with that project. So they have no time to play around. So at least we have drawn the pupils from “extra-curricular activities” to school work. [sic]

Researcher: Can you tell me about any involvement with your local community with regards to teaching of games and HIV/AIDS?

Interviewee L: At first we did not have materials (and equipment) in the school, and we
used to give projects to the pupils. And you find parents coming around, asking, “Why you are giving work to our children?”, they cannot make hoops, “What is this project for?”, you are just making the pupils dirty. So the administration called for the parents, they had a meeting and that is when they understood what really was going on. But now I think, they even bring materials. Because we even have some local teams around and when you don’t have something you go to them and ask from them and they give out willingly. [sic]

Researcher: Just to recall, there was a meeting held specifically about physical education between the parents and the school?

Interviewee L: Yes. Because we had those parents who said, no, my children cannot do that, we said no. Physical education is not just them doing activities, they have to know how to make things using their own hands, they are kept busy. So when they were explained to, I think, from that time, they understood what we wanted. [sic]

It is difficult to adequately convey the challenge of advocating for students to participate in a subject that is not examinable, let alone one that most Zambians do not believe leads to a valuable career. This is complicated by the fact the particular school under discussion here is located in a rural community and that the advocate for the subject is female. This makes the response by the interviewee that much more remarkable, particularly her insistence on getting students to make their own equipment for use in physical education, especially as some respondents complained of a lack of equipment.

I found it interesting that most respondents spoke of alternative careers, and in particular of professional sports, as one of the goals of the decree. However, no one made reference to the Zambian female boxer, Esther Phiri, who, at the time of the interviews, was an undefeated Women’s International Boxing Federation Intercontinental Junior Lightweight Champion and constantly in the media. This to me spoke volumes of the distance women and girls have to travel before Zambian society can begin to recognize their contribution. As of 2012, Phiri remains undefeated, and after a visit to Zambia in
February 2012 by the United Nations secretary general, she is believed to be under consideration as a UN Goodwill Ambassador. The challenges women face can be alleviated by exposing more students to female physical educators and to the likes of Phiri. Additionally, female physical educators need to be supported in becoming key advocates for sport and physical education. The more students see these individuals in sport, the more society will begin to truly recognize their contribution. The following exchange is illustrative of this point.

Researcher: And do you recall at the time what the reaction was? When you were hearing about this Presidential Decree, what did you think about it and how did other teachers react?

Interviewee J: I welcomed that because physical education, or PE, in schools, it has been going on all along, especially the time when President Kaunda was in power, most of the schools in Zambia, they were doing PE with pupils and that happened to contribute a lot to the country’s sports arena because by that time I can tell you, Zambia as a nation we used to produce a lot of sports men and women. People such as Samuel Matete who was 400 metres runner, and then we had a lot of footballers especially, you can talk of the great Kalusha Bwalya’s, Godfrey Ucuh Chitalu, Alex Chola, Asheus Melu all those people are products of school activities, because I remember when Kalusha Bwalya started playing for the national team, he was seventeen years old and that was the game that they played against Congo DR, and he was a school boy, so you see, it was because of PE which contributed to that. So it was a very welcoming thing that the president mentioned to say that PE should be introduced in schools on a serious note. [sic]

What I found particularly telling in the response of the participant is how he noted that “Zambia produced a lot of sports men and women” and then went on to list the names of only men. As noted earlier, this speaks volumes of the task ahead, as this particular male individual who happened to be trained in sports and physical education could not even reference a female world champion but cited a number of footballers. In February 2012, Zambia won the African Cup of Nations (AFCON), and as a result the country has new sports icons that will be celebrated for years to come. In this excitement, sport and
physical education will likely receive great attention, but unfortunately, the focus might remain on football and on male players, to the detriment of the wider potential of sports for women and men.

7.3 Shifting Gender Relations

Gender studies are not focused on females only and are not to be confused with the study of women or with feminism (Meier, 2008, p.5). The responses of the participants raised the issue of gender in several ways. The majority of responses suggest that a lot needs to be done in communicating what gender is and how to address it, particularly as the majority of the discussion on gender centred on the separation of boys and girls. The emphasis on the attire that girls wear and the perceived homogeneity of femaleness or maleness particularly stood out. Listening to the responses, I got the sense that gender is assumed to be deterministic in Zambian society, with gender determining who you are as an individual, rather than the other way around. If progress is to be achieved on this issue, upcoming generations need to move beyond the approach of noticing one’s sex before paying attention to the individual. Given historical and cultural dimensions, this is easier said than done.

It is perhaps important to re-emphasize that the decree appears to have had a favourable impact on gender relations in the classroom. The school setting in which the decree is being implemented appears to offer spaces where a cultural transformation is taking place as teachers exercise their voices and more students participate in physical education. The games being played bring with them lessons about inclusiveness and fair play that are carried beyond the classroom. A common theme among all interviewees was the observed change in the dynamics of interaction between boys and girls over time. These responses suggest a pattern of interaction among boys and girls that should be further explored. Prior to the mandate, girls and boys sat separately. The decree has led to increased interaction among the sexes because of physical education’s focus on participation and inclusion. Interviewees cited initial disapproval and distrust from some parents in local communities at girls playing sports. Many also believed that the interaction with boys promoted promiscuity among the girls. This has given way to greater acceptance of girls engaged in sport within local communities. Interviewees further observed how students have moved to viewing each other as equals, and to
interacting much more socially, not only in the classroom but also outside school. These experiences give a sense of optimism for how a society can and should address historical relations between the sexes that have privileged males, and they certainly point to an avenue for further study.

Researcher: You talked about how they are mixing more, perhaps you can share an example of how this is happening, some of the games that you are using?

Interviewee L: Some activities where they will mix, they will be in pairs, where maybe a girl is on the back of the boy or the boy is on the back of the girl, those activities tend to make them feel they are the same, so we encourage those activities, and it encourages them to learn more, because they are very free with each other because they can ask any questions to each and they can answer those questions. [sic]

The response above suggests that this deliberate action of ‘undoing’ gender roles can have beneficial effects in the manner that Baja (2009) demonstrates in her comparative study of a government and a private school. The private school is able to achieve greater awareness of human rights issues, and boys participate in chores (sweeping/cleaning) that are predominantly undertaken by females in Zambian society.

7.4 Gender Challenges

Participants identified several challenges in response to the question, “What are some gender-specific challenges and opportunities within your school”, the majority of which focused on dress and suggest a limitation in the understanding of the complexity of gender, as the responses indicate that all girls and all boys are the same. The following responses illustrate this:

Researcher: Can you share with me some gender-specific challenges and opportunities within your school?

Interviewee Q: The challenges that we have in gender is that you find that when you go for physical education some pupils because of their background, they do not have the attire to put on. Some would feel uncomfortable to do some certain activities with the opposite sex. According to the traditions of Zambia it’s like remaining may be half naked,
I would say so, to them it is a taboo. So they would want to dress may be with a wrapper on and just like that. They would want to dress properly, not like a physical education pupil, they just want to dress in the normal way, maybe putting in a trousers or other things. They feel very much uncomfortable when they put on a short and something like a breast holder. They feel very uncomfortable leaving part of the body naked. [sic]

Researcher: Can you share with me perhaps some experiences of how maybe the Presidential Decree has addressed some of these gender challenges?

Interviewee P: It has addressed the gender challenges by, when you are exposed like in a rural setup like Luangwa, when you are exposed to, we give them a film to show where others are performing, they feel better to dress like that, they learn a lot from those as we keep on doing physical education. It really helps them a lot. It has reduced that embarrassment for the girl child. [sic]

As noted earlier, participants’ responses cite attire and dress as challenges, but there was no corresponding discussion of adapting the games or activities to accommodate girls. Additionally, perhaps allowing girls to wear shorts and skirts did not appear to have been considered. This is significant given the organization Play Soccer’s finding that in a survey conducted in Lusaka, it seemed socially acceptable for girls to wear shorts in public during physical activities, in contrast to research on contemporary Zambian culture that found that girls and women should wear dresses (in Meier, 2008, p.14). Meier argues that while this example might appear irrelevant, it really gets to the heart of the nexus of gender, sport and development: If girls are standing at the sideline of a pitch watching the boys play, it does not necessarily mean that they are not interested in participating. In this specific case there is no need to supply shoes or balls, but shorts enabling girls to run, jump, enjoy themselves and thus become part of a sports program (p.14). The response given by one respondent was particularly telling about how some teachers respond to the issue of attire to ensure that students can participate. It also illustrates an example of a small yet meaningful approach.
Researcher: And where students are concerned, in terms of getting more girls to participate in activities and coming to physical education lessons in the right attire and those kinds of issues?

Interviewee H: Yes actually on attire, sometimes, it is not every day, but just a few times, especially girl child, when they come and say, no sir, I am not feeling well I am sick. Sometimes it becomes a problem whereby you cannot force them and you don’t actually know exactly what is wrong with them. But some of them you find that today they say this, tomorrow they will be with you, others, it is a natural thing that they will give you problems, but we try to address those problems as we go on. Some of them we try to initiate things or activities which will attract them so that next time they do not remain behind. So where attire is concerned, yes, they come with attire, although you have to look at the background where the children are coming from, some of them have problem with buying the right attire, so just tell them as long as it is a short, it is a track bottom, it is tracksuit, it is OK, you can come through, just let them wear things in which you feel comfortable. [sic]

The respondent’s willingness to consider a range of attire is particularly encouraging given the often strict Zambian school system in which a uniform dress code is rigorously enforced. It is equally telling that the respondent talks about letting students wear attire that they feel comfortable in. At a time when there is real concern about getting people physically active, and in this particular context, to get them to participate in physical education and to learn about and engage in HIV/AIDS preventive education, being as accommodating as the respondent above is something that should be encouraged.

There are other signs of changes within physical education whereby male teachers are beginning to recognize the role of female teachers as equals and working together. The following exchange, although lengthy, captured the elements of the challenges and changes experienced:
Researcher: Can you share with me some gender-specific challenges and opportunities within this school, I am thinking maybe appropriateness of activities, participation between the two genders, any other opportunities?

Interviewee H: Where gender is concerned, we have no problems. Like for example right now if you look at my core assistant in physical education, she is a lady who I am teaching with Grade 8 and 9. This school is full of ladies, roughly we have about 38 to about 42 females, males only about 11 or 12 somewhere there, so you can see the majority here are females, but the school had been performing very well. We have been working very, very well with our female colleagues, especially where physical education is concerned. Even when we have internal activities like inter-houses, they come on board. And I can tell you these people produce wonders, most of them we have them as house mistresses and they perform very, very well. I have never been disappointed at any time. The only problem we have is maybe our fellow female colleagues those who are about to retire, you know they are big, they are old, and so and so those are the only ones we tell to relax, you know they need to cool down. [sic]

Researcher: The way you speak about gender issues in this school, it seems the school is doing really well. Is that because of more female presence on the staff or what do you attribute that to?

Interviewee H: I think it is teamwork. I think it is teamwork. The teachers, what they do if they see there is a department where things are not going well, just ask them to help, they will really come in and assist, that is what I have seen. For example, like me as the head of department, I am responsible with my colleagues in the sports committee. We make the timetable for sports activities in the school. But when it comes to activities like inter-house, inter-schools, when you tell them to say, ladies and gentlemen I want some teachers to belong to good four houses here, I want teachers to belong to each house, you tell them. Grade 1s are involved Grade 2s up to Grade 9s, they are all involved, teachers are always there to assist. You find the teachers saying, I will train my children, if I train them I will give you the best pupils in my class, this one, I will train my pupils and give
you the best. And when it is time for the activity, they are all there cheering, although some, one or two people, can leave early, but the majority are always there. [sic]

I found it interesting that the participant responded that they had no problems with regards to gender and spoke about the composition of the teaching staff and how other female teachers contributed to the annual inter-house competition. As I reflected on this, I wondered if the scenario in this school actually advanced the perception of female physical education teachers as equals or more realistically reproduced and furthered the existing dominance of males in physical education, particularly as the respondent was the “head of department”. The reference to being the head of department appeared to me as a way of reasserting the respondent’s influence or power over physical education and sport in school. This particularly stood out in this school as the interview was being conducted in a very small room, one the size of a closet in which the little sporting equipment was stored and into which the two of us barely fit. This small room was the Department of Physical Education, and to hear someone talk about being the head of department in this very confined space was rather strange to me, but it appeared to be highly symbolic to the respondent. I thought about some of the staff and teachers I had seen when I was sitting in the office of the headmaster as the respondent spoke of female colleagues that were about to retire that “needed to cool down”. Why does a person close to retirement with enthusiasm to participate in physical activity need to be told to relax? The respondent mentioned having a female assistant in physical education, and the majority of the narrative focuses on the contribution of female teachers to the inter-house sports competitions that are held once a year. I wondered if female physical educators were being marginalized to the role of assistant/inter-house coordinator, while at the core resided the male teacher in charge of physical education and the head of the sporting competitions in the school. If the roles were reversed, with a female physical educator at the core, the narrative would certainly project a much more progressive environment, one that would diminish the perception of male dominance in physical education and sport. What did stand out and appeared to be a sign of change was the apparent openness of the respondent to the idea that female colleagues can produce “wonders” in the area of
sports, as well as the existence of a seemingly collegial and supportive work environment.

A noted impact of the decree is that more teachers are now teaching physical education and that students are now more often exposed to female physical educators who have the potential to serve as positive role models that demonstrate success in non-traditional teaching careers. Speaking about the impact of the decree on female teachers, a respondent provided the following response that speaks to a potential increase in female teachers of physical education.

*Researcher:* Can you share with some gender-specific experiences of how the decree may have addressed some of these challenges?

*Interviewee H:* Like for example this school, I think even before the decree, I think, on the decree may be a situation whereby maybe some teachers who teach physical education, but not according to the way it is taught, they do not pay too much attention. After the decree, then you find that the administrators say this subject is now even on the timetable it is on. That is why you have seen our colleagues, especially the females, they are coming in and teaching now. I think that is the only thing that I have seen that has changed after the decree. Most of the female teachers are even going for PE courses. I have got these two ladies who went to study physical education. I think it is doing well.

[sic]

The above response in part suggests that the decree has facilitated situations where students are now able to have relatively more females teaching physical education and that these teachers are seeking professional courses and training. This, however, was one participant’s experience. To what extent this is happening in other schools throughout the country is certainly a useful question for future policy development in physical education. Nonetheless, this participant pointed to the beginnings of significant social changes that at least, in this particular school, challenged the dominant societal perceptions on females and physical education.
7.5 Chapter Summary and Conclusion

The Presidential Decree has had considerable impact with regards to feelings of empowerment, and the early indications are that this is beginning to challenge traditional gender roles. The decree has enabled students and teachers to challenge “management styles that tend to be authoritarian with limited participation, delegation, and communication with respect to major school management functions” (Bennell, 2004, p.10). The administrative significance of a decree, even when it has not been well articulated, should not be underestimated. The Presidential Decree has also influenced social interactions among students and between students and teachers within the classroom that point to favourable shifts in gender relations. These positive social interactions are supported by Bajaj’s (2009) case study from Zambia that finds “pedagogical practices to succeed in destabilizing norms of gender subordination and gender-based violence” (p.483). The responses offered by the participants also provide more information about the relations of power within the education sector and about how physical education was implemented prior to the decree.

As favourable as the results of empowerment and gender relations are, they need to be considered in the broader societal context. As one participant revealed, the response of parents to their daughters being engaged in physical education suggests that cultural beliefs in Zambia can limit the opportunities for girls to participate in sport and physical activity. The responses were particularly revealing of the privileging of males/boys over women/girls and of the patriarchy of this society, no more so than on the issue of attire in physical education, which appears to be problematic only with regards to girls’ clothing, not boys’ or their behaviours.
Chapter Eight:

Conclusions and Recommendations

“Uwa Kwensha Ubushiku Bamutasha Nga Bwacha”

—Bemba proverb

8.1. Introduction

In seeking an answer to the question on how the research findings address the research objectives, I have drawn on the social and cultural practices observed in offices, schools and workshops, as well as on participant responses to interview questions, to combine insights into the Zambian education bureaucracy, which is ultimately charged with delivering on the goals of HIV prevention education. These insights reveal contradictions both within the sector of education and within the Zambian sociocultural landscape, leaving one without definitive answers. Instead, the answer(s) and recommendations lie within contextualized, nuanced perspectives that are assessed through short-, medium- and long-term perspectives.

To begin answering the question, therefore, I reference an oft-cited Bemba proverb, “Uwa kwensha ubushiku bamutasha nga bwacha”. Directly translated, this saying means, “Someone who guides you to travel in the night is only praised in the morning for his or her efforts”. The proverb concerns leadership, and Bemba ancestors suggest that a leader must have a vision where others may not see the way. The proverb is thus about looking ahead and planning, and about confidence: it is easy to get lost in the night, but if you know where you are going, you can lead the people through a challenging journey to reach their final destination in the morning.

My choice of this saying deliberately references the revival of traditional games and knowledge in Zambia, and by extension, the country’s cultural capital. The proverb also reminds readers of the cultural context under study here, that is, Zambian society, in which proverbs such as these are usually invoked both casually and at official events. My invocation of the proverb therefore constitutes a small effort to broaden the interest in Zambian society and thus in policy analyses of Zambian education. Airhihenbuwa and Webster (2004) have found, after all, that the failure of HIV prevention policies in Africa is attributable to a lack of contextualizing strategies and to reifying individuals rather than community strategies.
Significantly, the proverb touches on many issues pertinent to the 2006 Presidential Decree and its assessment. The notion of traveling through the night in part suggests attention to the environment (education bureaucracy), distance and a need for a long-term perspective. Rushing to make judgments about success or failure within six years of the enactment of the decree diminishes the potential long-term benefits. In this way, such a critique would reproduce the short-term outlook modeled by SAPs and IMF policies for education. Along this journey, one of course needs to assess how those traveling (teachers, students) are faring and if one is generally headed in the right direction (vision/goals). The proverb highlights the importance of leadership and, applied to the decree, of the need for champions of physical education within education, people like teachers and the SESO and organizations like PETAZ. Lastly, physical education and sport for addressing HIV/AIDS are relatively new approaches and as such require a clearly articulated vision on how they may be able to contribute meaningful solutions to HIV prevention. These visions must also attend to the sociocultural aspects of life in Zambia, aspects that create an environment increasing the vulnerability of girls and young women to HIV.

With this as my starting point, I will highlight in what follows key findings, particularly as they relate to contradictions between the stated policy goal of the decree and practices observed. I then consider these findings within the broader sport for development movement and the potential contributions of this study to the literature. Finally, I provide recommendations for Zambian education and identify possible future avenues for research. In considering these findings, it is worth remembering that evaluations and assessments are not panaceas and do not necessarily lead to magic solutions. In assessing and evaluating the responses offered by participants and derived from my own observations, I have tried to contextualize the findings and to recognize some of the inherent challenges and shortcomings of conducting evaluations or investigations. Key among these shortcomings are that evaluations are not the only tools for generating information and that, potentially, evaluations may be perceived as intrusions or undue scrutiny by those assessed, such as administrators and teachers. This can and does elicit negative responses and may undermine the potential of learning from
policy implementation experiences, as McLaughlin (1987) and Oakes (1989) have argued.

8.2 Conclusion

The aim of the study was to explore the implementation of sport for development in one of the few instances where a country, Zambia, has revitalized physical education in its national curriculum to leverage the appeal of sport and play to address larger development issues. Specifically, the overarching focus of this study was the development, announcement and implementation of the 2006 Presidential Decree about Physical Education. It is worth reiterating that the 2006 Presidential Decree made physical education mandatory for all levels of the education sector and views physical education as a means for the “enhancement of values, skills and a holistic development of the learner” and as a way to address the challenges of HIV/AIDS (Ministry of Education, 2006). The analysis of the Presidential Decree’s development, promulgation and implementation is perhaps one of this study’s strongest contributions, particularly as the findings reveal limited plans and investments to engage key stakeholders such as schools, teachers, parents and administrators in the goals and objectives of the decree.

My positionality and role as a bearer of transnational power were useful for how I approached the research question and my interactions with participants. They enabled me to better understand the dynamics of researching within and across one’s culture, as Merriam and colleagues (2001) have argued. At different times throughout the research I relied on my education, gender, middle-class status, professional experience or a combination of these in negotiating social relationships, and this simultaneously gave me access to and distanced me from individuals within the education bureaucracy. An appreciation of the uneven power between research participants and myself was essential to the collection and interpretation of participant responses.

The responses offered by research participants paint a picture of tensions and contradictions within Zambian education, such that the decree both constrains and opens opportunities to strengthen HIV prevention through physical education. The responses offered by participants raise seven key themes that encapsulate the outcomes of the 2006 Presidential Decree. My assessment of the decree’s effectiveness is based on these findings and suggests both successes and failures.
8.2.1 Development, Announcement and Promulgation of Presidential Decree

The development, announcement and promulgation of the 2006 Presidential Degree were important to the initial analysis of its impact, as how participants came to learn about the degree provides rich insights into the support for and prioritization of the decree and physical education within the broader education sector. What individuals (teachers, headmasters, PEOs) understand the goals of the decree to be in many ways shapes their and institutional responses to it. These responses in turn provide a snapshot of the impact the decree will likely have throughout the country.

A starting point in assessing the impact of the decree is to take account of the subject it was enacted for. Physical education has long been a marginalized subject on the Zambian education curriculum and in wider Zambian society. The subject’s non-examinable status until after the decree’s enactment meant that the subject and its teachers were constantly fighting for space and recognition on the school timetable and in the staff room. As a result, until the decree came into existence, the teaching of physical education in schools was inconsistent at best. From this perspective, the decree has had a profound effect in Zambian schools: teachers are now not only teaching the subject but also feel empowered to challenge dominant institutional practices that may continue to marginalize physical education.

From the perspective of education policy, the decree’s development, promulgation and announcement have been rather poor. In chapters 3 and 4, I attended to the decree’s development, in the process highlighting several cultural moments that raise cross-cultural, geopolitical and postcolonial concerns with issues of power inherent in all three categories. The actual decree was enacted in 2005 in a context of somewhat questionable motives. As related earlier, the decree derived in part from London’s 2012 Olympic bid, and the question was what Zambia stood to gain from supporting it. Did a commitment in the form of a decree constitute a partial condition for being selected as one of the initial countries in the International Inspiration support programme? This poor initial development was followed by lackadaisical implementation until the following year when, at the 2006 Workshop on the Use of Physical Education, Sport and Traditional Games as Preventive Education about HIV/AIDS, the Zambian president, faced with potential political embarrassment in front of donors and the media, reacted
forcefully by threatening the dismissal of those in senior management who continued to neglect the decree’s implementation. These events are pivotal to understanding the decree and any response to it. The threat of possible dismissal led to a more urgent restatement of the decree, emphasizing the need to start teaching physical education at schools immediately. From a policy perspective, such a statement should have been informed by research on the experiences since the 2005 declaration, yet it appears this was not the case. At the same time, the re-stated decree remains short on specifics and uses the broad, and rather vague, language of life skills, rather than adequately spelling out the decree’s intended outcomes beyond the mere requirement for the regular teaching of physical education. Beyond the workshop, the decree was announced to the education sector via a Ministry of Education circular that many addressees have yet to receive. This means that teachers and schools are left to their own devices regarding the decree’s goals, which has left participants in this study with highly divergent opinions about these objectives. Following the issuance of the circular, the responses of participants suggest a weak promulgation strategy, as key stakeholders such as parents and administrators have not been consulted or made aware of the decree’s significance or objectives.

Given the foregoing, is the 2006 Presidential Decree a total failure? Not entirely, when measured against the decree’s intended outcomes. The decree sought to put physical education back on school timetables and intended the subject’s regular teaching. Because the Ministry of Education, despite the decree, seems to continue to undervalue the contribution of physical education to larger goals in the education sector and thus gives limited active support to the implementation of the decree, these goals have only partially been achieved. Ineffective implementation has also meant that the initial enthusiasm shown by teachers to implement has not been sustained, because they feel left alone in their work. However, the decree is making a difference in the sense of wider community acceptance: in some rural communities, girls participating in physical education are accepted by previously unsupportive parents, and the teaching of the subject with components of preventative HIV/AIDS instruction also seems to have come to be considered normal. These differences can be regarded as some of the decree’s (unintended) positive consequences.

From a policy perspective, these experiences raise the further question of whether
policy development and promulgation do not work in Zambian education. It is my contention that policy development and promulgation can and does work there, and that the failings described above have more to do with the decree’s focus on physical education per se. Recent progress towards attaining the Millennium Development Goals on education, which seek to expand access to education, offers a case in point. This goal goes well beyond building schools and requires thoughtful planning and the allocation of resources (administrative and financial). Apart from the fact that Zambia has indeed increased the number of students enrolled, what equally stands out for me is that three successive government administrations have followed through on this policy and its implementation (started in 2002).

McLaughlin (1987) and Oakes (1989) argue for paying close attention to the context within which policies are enacted and suggest that the experiences and information gathered be applied to successive policies. From this perspective, the poor development, announcement and promulgation provide rich insights in what does not work well in the context of Zambian education policy, which can be useful for successive policies, particularly as Zambia will soon turn its focus to education quality rather than access. As such, the Zambian experience provides a useful example to the broader education policy literature, as it confirms that the education policy literature drawn from non-African settings works just as readily in African settings.

8.2.2 Addressing HIV/AIDS through Physical Education in Zambian Schools

Perhaps unsurprising given the conclusions about the decree’s development and promulgation, the results on how physical education is being used to address HIV/AIDS show up contradictions as well. For one, the rhetoric about the seriousness of the HIV/AIDS epidemic and the education sector’s necessary response to it does not match the reality experienced by research participants. Most participants, while expected to address HIV/AIDS in their teaching, have not attended workshops or training on HIV/AIDS and physical education. While this may also be the case for other subjects on the curriculum, this issue is much more profound for physical education, because many teachers barely taught their subject consistently prior to the decree and could therefore benefit from programs that focus specifically on how to incorporate HIV/AIDS education into physical education pedagogy. I have argued that inconsistency in teaching leads to a
focus on physical education as practice rather than as a broader perspective that is likely to be more inclusive of all students and the wider curriculum. Most physical education teachers have learned about how to address HIV/AIDS through informal networks not sanctioned by the government, exacerbating opportunities for misinformation, contradiction and possibly harm. Let us remember that this situation is occurring at a time when HIV/AIDS is considered a national priority. Additionally, the Ministry of Health appears to have limited influence on the information disseminated about HIV/AIDS in government schools, suggesting poor inter-ministerial collaboration, certainly where HIV prevention through physical education is concerned.

The strict adherence to teaching scripts, steeped in the ‘banking’ style of education, means that the emancipatory elements of physical education are not drawn on. These emancipatory elements can develop critical awareness along the lines of Freire’s (1972) notion of conscientization and may empower learners to challenge societal practices and expectations that render difficult HIV prevention. Participants often associated successful physical education lessons for addressing HIV/AIDS with structure. The responses suggest that addressing HIV/AIDS in many instances is a case of repeating a few methods of prevention without fully acknowledging the very real social and political contexts that fuel the spread of HIV/AIDS. Given the maturity of the HIV/AIDS epidemic, a simple awareness of the disease is not sufficient. More contextual questions that would challenge learners to interrogate the circumstances of their realities and interpersonal relationships, particularly around gender, are needed. By way of example, dress was repeatedly cited as a challenge to addressing HIV/AIDS. Often this related to girls’ attire and its supposed potential to arouse boys and male teachers, possibly leading to sexual relationships. Missing in these responses were suggestions for adapting and accommodating those girls who did not have the expected attire. More important, the problem appeared to be with the girls, with boys and men apparently allowed to act on their feelings of arousal, which suggests a disempowerment of women. If the Ministry of Education, and by extension the Zambian government, wishes to enhance its HIV/AIDS prevention program, consideration of such gender-related questions is a useful starting point.
In keeping with the contradictory nature of the results observed, there are signs that physical education, and particularly traditional Zambian games, are capturing the imagination of students, thus creating avenues for successful HIV prevention programs (when appropriately implemented). With the revival of traditional games and the growing pride in Zambian culture and customs, there is tremendous opportunity to deeply engage learners in critical and emancipatory education practices that get to the heart of the sociocultural practices possibly fueling the epidemic. This opportunity would be in line with Airhihenbuwa and Webster’s (2004) call to contextualize HIV prevention programs if the failures of previous African HIV-prevention initiatives are to be avoided.

### 8.2.3 Revival of Traditional Games

Postcolonial literature proved particularly helpful for contextualizing the ongoing revival of traditional games and their increased popularity in Zambian culture and ceremonies. Specifically, this literature and the responses offered by participants expose the tensions and contradictions between the Zambian love for imperialist-in-origin games such as football (considered a national sport) and the anticolonial championing of traditional games and ceremonies.

The legacies of colonialism are such that the use of traditional languages or of the so-called vernacular are sometimes prohibited and often frowned upon within the school setting. Indigenous Zambians are hereby complicit in their own cultural domination, favouring the English language and giving a vulgar meaning to the term ‘vernacular’. This is akin to Whitson’s (1983) conclusion that cultural domination is accomplished when homegrown cultural artifacts are seen by local people as less attractive. The irony of this is that throughout my years of involvement in Zambian physical education, official meetings and workshops often began by senior officials recounting the traditional games they played while growing up and emphasizing how instrumental these were to their emotional and personal development. To this day, however, the Ministry of Education does not have a formal policy on traditional games; it is, rather, implied in other policies, leaving the inclusion of the games in class to the discretion of the teacher.

It is my contention, however, that the rising popularity of Zambian customs, ceremonies and music is contributing to excitement among students and teachers. Additionally, Zambia’s recent triumph at the 2012 Africa Cup of Nations has added to
this fervor for sports and culture. In this regard, there is great cultural capital to be leveraged for subjects such as physical education. Some participants in rural areas noted students re-enacting activities conducted during school hours while at home and foregoing previous activities such as associating around bars and drinking establishments. Such statements suggest the possibility of greater student engagement and a distraction away from un favourable activities (Mwaanga, 2010).

While such behaviour is not novel, students re-enacting activities is very telling when viewed from the perspective of student engagement and societal perceptions of sport and physical education. A didactic style of education does not lend itself well to student engagement, particularly as adolescents are unlikely to repeat activities outside school that they consider boring and uncool. With key messages and instruction that allow students to interrogate the circumstances of their everyday lives, traditional games can make a significant difference in the area of HIV prevention.

Alongside the issue of student engagement is that of societal and parental response, especially with regards to girls’ participation in physical education classes. In chapter 3 I noted the experience of a teacher with regards to community backlash by parents for the insistence on teaching and encouraging girls to participate in physical education. However, it is not until students started going home asking their parents about their family’s ancestral games and for assistance acquiring materials to enable them to make equipment for traditional games that parents began to see the benefits of allowing their children to participate in physical education. This phenomenon supports the argument that traditional games can link school children with their elders. I recount this story to demonstrate the usefulness of the cultural capital that comes with the revival of traditional games and its potential across the curriculum, not least its ability to develop vocational skills (making local equipment) that are appropriate for the Zambian context. At the same time, encouraging students to inquire about their ancestral games may allay some of Goslin and Goslin’s (2002) concerns regarding the authenticity of the culture being revived and about the loss of indigenous cultural heritage.

The decree has had a favourable impact on the revival of traditional games within Zambian education, but to date this remains sporadic and not well conceptualized. At the moment, a significant amount rests on the interests and motivation of the teacher. The
seemingly contradictory nature of Zambian culture celebrates the male-dominated, imperially imposed game of football (reclaimed as Zambian) and continually subjugates indigenous languages and customs in schools, while officials reify the contribution of traditional games and culture to students’ development and success. At the same time, outside of school, interest in all things Zambian is on the rise and evokes great national pride. This resurgent national pride offers much cultural capital, but unfortunately the Ministry of Education has thus far failed to recognize and utilize it to the benefit of physical education. The physical education community has equally not capitalized on this cultural capital and inserted traditional games and physical education in wider debates about the direction and priorities of Zambian education. With every workshop (and there are many) that senior officials attend and at which they recount the contribution of traditional games to their individual development, an opportunity is lost when no connection is made to how traditional games can help solve some of Zambia’s education challenges.

8.2.4 Shifting Gender Relations
Addressing gender within this study probably constituted one of its most challenging aspects. The participants offered thought-provoking responses that shed light on how gender is understood within Zambian society.

Gender was highly problematic because of perspectives that focus on binary aspects of sex and on historically produced gender roles. These perspectives are reproduced and reinforced by the education system, such that females are regarded as nurturing, gentle homemakers, while males are perceived as strong, athletic natural leaders. The participants’ responses suggest a reluctance to confront these issues head on. One needs to be cautious with the language of empowerment often associated with sport for development, because its reverse side is personal harm, particularly physical violence and abuse within relationships, which are common and accepted in many parts of the country.

However, there are signs of improving and, possibly, shifting gender relationships. Baja’s (2009) case study provides a useful example for my current work. Bajaj (2009) demonstrated that by adopting a relational approach to gender, what she refers to as ‘un-doing’ gender, a private school has challenged societal expectations of
gender roles, specifically those of cleaning homes and schools, often considered women’s work. This may not sound significant, but it is. All students participating in cleaning, combined with revised school policies and practices reflecting values such as social justice and equity, proved instrumental in changing perceptions among boys and girls about gender roles in society. The current study suggests that by encouraging greater interaction among boys and girls within the classroom and through the use of traditional games, which help integrate girls and boys in the same activities and place them on the same footing, the asymmetrical relationship between boys and girls may begin to tilt as students begin to perceive each other as equals. Such practices, as Bajaj (2009) has argued and demonstrated, enable schools to resist and transform unequal gender relations.

While these possibilities are promising, traditional games and physical education alone, the present study suggests, cannot address the wider social and historically produced conceptualizations of gender. They require deliberate and supportive environments in which these ideas can be exchanged and addressed. So while the study highlights positive avenues for shifting gender relations, they remain limited. For example, potential female role models such as Zambia’s boxing champion Esther Phiri are not highlighted within physical education, and when alternative careers are discussed, football remains the barometer of success. By their very nature, professional sports are competitive, meaning that not everyone can succeed, opportunities being even more limited for women. The promotion of alternative careers and role models should not preclude careers and individuals from other fields such as farming, physical therapy, sport psychology and sociology, for example.

8.2.5 Inclusion and Disability

At the national level, the education system displays signs of hindering the movement towards more inclusive education, which stands in contrast to observed practices at the local level, where one can witness the increased integration of students with disabilities into the daily routines of schools, thus contributing to less discriminatory school environments.

As the realities of the impact of HIV/AIDS on education are becoming well understood and countries begin to plan for the aftermath of Millennium Development Goals and Education for All, there is an opportunity to design and plan more inclusive
education systems that are accessible to all members of society regardless of ability. Increasingly, the majority of countries from the global South will need evidence from similar settings with equally limited resources on which to develop inclusive and sustainable systems. The current research shows that sport for development can be an avenue for the development of inclusive education systems.

**8.2.6 Teacher/Administrator Experience**

Teacher training, or the lack of it, is highly problematic within physical education and raises concerns for the Ministry of Education’s existing model of in-service training. Pedagogically speaking, the strict adherence to structure and to teaching scripts is inadequate for the development of critical awareness and emancipatory approaches.

The lack of an associated teacher training strategy to accompany the 2006 decree means that ad hoc workshops are how most teachers learn about incorporating HIV/AIDS into physical education. As Schwille and colleagues (2007) have noted, onetime workshops are unlikely to result in changed behaviour or in the improved delivery of instruction. In the case of Zambia, these workshops may increase excitement among physical educators, but because of their short duration and limited or no support beyond the workshops proper, teachers end up relying on and reinforcing the ‘banking’ model of education after all. As discussed earlier, this situation can also reinforce the perception of physical education as the mere practice of sporting activities. Additionally, some respondents reported that they had not received any training on HIV/AIDS at all. With these ad hoc workshops not being strategically linked to long-term goals in the education sector, they can prove ineffective and costly (Schwille et al., 2007, p.33). As such they fail to take advantage of existing cultural capital from traditional games that participants reported lead to higher levels of student engagement.

Equally troubling for Zambian education planners is the fact that most respondents reported an ad hoc monitoring of physical education with regard to teacher instruction. In some instances, several years after graduating from teacher training college, teachers had not been inspected, and in some cases a mere phone call counted as teacher evaluation. I take up this issue in the discussion of the education sector as a whole, but it is important to mention here, as this format has direct implications for educational quality and the attainment of larger goals in the education sector. Regular
teacher inspection can inform current and future policy implementers of the realities in the schools and of teachers’ training needs. Yet irregular teacher inspection, combined with a lack of training for the inspectors themselves, gives lie to the decree’s official rhetoric about the significance of addressing HIV/AIDS through physical education. Further, the argument usually presented for infrequent inspection—inspector capacity and higher-priority subjects—reinforce the notion that physical education consists mainly of children playing outside the classroom. This negative view of physical education clearly does not envisage the subject making meaningful contributions to education-sector priorities.

Respondents did not identify any challenges with the pedagogy of physical education or with how physical education can be used to address HIV/AIDS. It could well be that participants are confident in their abilities, but as the discussion in chapter 5 demonstrates, ideas about the ease of addressing HIV/AIDS within instruction has the potential to reinforce stigma and discrimination. Without training to support teachers, the probability of this happening in schools is high.

Given the issues discussed above, it is not surprising that a number of NGOs are filling in the void left by the government’s continued prioritization of other subjects. The work of these organizations is both highly commendable and problematic. It is commendable from the perspective that these organizations are providing much-needed teaching materials and strategies that seemingly have worked in community sport for development programs. However, these organizations to a large extent also determine the circumstances of their participation in schools, and the sustainability of their programs remains questionable. This particular issue is relevant to both local and international organizations. Local and indigenous organizations have a great opportunity to better contextualize their activities and to integrate them into physical education classes. This interaction between schools and organizations needs to be regulated in such a way that they support the national curriculum and strengthen the capacity of teachers and of the Zambian physical education in-service training model.

Teacher training and administrator experiences suggest that teachers, administrators and the education sector are all responsible for the current condition of physical education in the country. One senior teacher pointed out that teachers should
share the blame for physical education’s low status. This raises a number of issues related to the sphere of influence and how power is exercised in schools and across the education sector. I attend to this in the following section, but it is worth considering here as well, as teachers may not be able to express their frustrations in a wider culture that deems disagreement as disrespectful and possibly worthy of punishment.

8.2.7 Need for a Strengthened Education Sector

Teachers have to operate in and negotiate several spheres within the school and across the education sector. The SESO, the headmaster and the PEO are the most influential personnel in the education sector with regards to physical education. The responses of participants suggest, for example, that the PEO has considerable influence over how individual schools allocate resources, which contradicts the aims of education decentralization in Zambia.

A poor promulgation strategy has meant that the highly influential individuals noted above have not engaged the education sector at large about the decree, including about its origins or goals. As a consequence, the decree’s nature and objectives are poorly understood, so that those responsible for the allocation of resources in schools and provincial districts often see it as a distraction to the core business of a school. The poor promulgation strategy also reinforces the association of sports with physical education, such that resources given to the annual school sports day are taken as contributions to physical education. Clearly, if the decree and future policies in education are to succeed, attention will have to be paid to how the education sector is organized and to how key individuals engage to ensure that their work and behaviours do not undermine key education targets and policies.

The dominant culture within schools and the education sector has its roots in the highly hierarchical colonial education model. This system’s legacies include the continued domination of local languages and knowledges by Western versions, such that traditional games and Zambian culture in general are not fully appreciated and leveraged to the benefit of Zambia’s education. This culture of chastising local customs and privileging dominant subjects on curricula limits the space to adequately address these issues, as historical tensions between curriculum specialists and teachers tend to dominate discussions regarding physical education curricula.
While it is easy to conclude that the education sector constitutes the main obstacle to entrenching physical education in international development, the sector holds great potential for attending to many social development challenges such as HIV/AIDS. The experience of El Salvador in reviving physical education to teach life skills and to address conflict resolution in primary and secondary schools lends support to the need for a strengthened education sector. The El Salvadoran experience further suggests that physical education teachers can and are capable of teaching broadly based programs—conflict resolution in the case of El Salvador and perhaps HIV/AIDS in that of Zambia. The government may be slow to implement decrees or to monitor progress, but there is a structure in place that covers the whole country, with approximately 1.5 million students enrolled in basic schools. Given the numbers involved, it is paramount to address the challenges noted in this study by directing efforts to strengthening the education system by reviewing the roles and functions of personnel and by articulating how policies will be developed, announced and promulgated. Identifying key personnel and their resource requirements is important. The study provides evidence that rushing to respond to decrees about physical education without employing such a systemic approach to implementation will likely result in failure.

8.3 Research Study Limitations

The research focused on the physical education community and the education sector. Many more individuals (out-of-school youth, adults and people with disabilities) that stand to benefit from sport for development are not enrolled in the public school system and do not come into contact with the influence of the teachers and administrators interviewed in this study. This is significant because HIV/AIDS has traditionally claimed the lives of those in the ‘productive’ age group (18–35 years).

Also, the study focused on Lusaka Province, but Zambia has nine other provinces. The experiences of the teachers and administrators interviewed may be very different to those in the rest of the country.

I was mindful of not essentializing my presence as a researcher. However, the potential of not paying attention to my role as a bearer of transnational power and the possible influence of this on my interaction with research participants could undermine the ability of participants to share responses and my interpretation of the findings. While
I made efforts to ameliorate the uneven power relationships between research participants and researcher, the literature suggests that one cannot totally eliminate the imbalance. This means that one has to be mindful of the uneven distribution of power when considering the responses and my interpretation of findings. In addition, the concept of social fields (Schiller, 2005) was useful for understanding the complexity of the research process, particularly in terms of how the various interactions with individuals in this study simultaneously placed me as someone with power (with teachers and administrators) and, to some extent, as a disempowered individual (with senior administrators). The concept of social fields as argued by Bourdieu (in Schiller, 2005) is particularly useful for understanding how my transnationality influenced my interaction with participants, my reaction to events in the field and my interpretation of the data.

Perhaps a significant limitation of the research was my inability to conduct classroom observations, which could have contributed significantly to our understanding of how students engage and learn about HIV preventive education through physical education in classrooms. This inability to conduct such observations in part derived from administrative challenges, exam schedules and the ongoing national fuel crisis. In addition, obtaining information about the making of education policy in Zambia is difficult. Resources such as teacher-training manuals or documents detailing the Ministry of Education’s conceptual approach to education policy development and implementation would greatly expand our understanding of the policy context in Zambia.

8.4 Research Contribution

This study is one of the first documenting government implementation of compulsory physical education and points to the improved status of physical education. This is significant in light of Hardman’s (2008) world survey on physical education, in which 80% of African countries reported physical education as having a low status. Additionally, the findings confirm that the literature on education policy implementation, drawn mostly from the global North, is equally applicable to education sectors in the global South. These findings also illuminate tensions and contradictions between the Zambian love for imperialist-in-origin games and the anticolonial championing of traditional games and ceremonies.
This study contributes to the burgeoning sport for development literature and specifically enhances the understanding within this sector of the role public-sector schools can play in implementing and replicating the well-documented benefits of sport and play in addressing social challenges such as gender inequality and HIV/AIDS, issues that affect children and youth in many poor local communities in the global South.

This study provides evidence of the implementation of SDP in national education curricula. Additionally, the study contributes to the recent call for scholars and activists in sport for development to become familiar with the colonizing tendencies within SDP initiatives (Darnell and Hayhurst, 2011, p.193). In this regard, this study contributes to this literature by illuminating some of these colonizing tendencies, or the ‘colonial residue’, and by providing evidence of how indigenous researchers can begin to dislocate them. It also calls attention to the need to be attuned to some of the associated insider/outsider dynamics when conducting research, not only within sport for development activities but beyond, in qualitative research in general. In this regard, the research contributes to the development of a critical methodology for SDP scholarship and practice that supports decolonization. In this study I use Darnell and Hayhurst’s (2011) definition of decolonization, which speaks to the sociopolitical importance and process of challenging colonial authority and supporting self-determination (p.184).

Darnell and Hayhurst (2011) note that a central concern of SDP research has been assessing the development contributions and impact of sport, as well as documenting the extent to and conditions under which sport, physical activity and physical education successfully contribute to various contexts (p.184). The current study contributes to this central concern in SDP by providing evidence of how SDP may be implemented in national education sectors, sectors that have received limited coverage in the SDP movement. This study supports the notion of sport and physical education as contributing to the attainment of development goals such as HIV/AIDS and poverty eradication. There is strong evidence that physical education and sport contribute to meeting development goals. Still, the relatively marginal status of physical education within some national curricula means that policy instruments such as decrees are only one of the few options at the disposal of governments—and indeed of the sport for development community—to ensure that the enthusiasm shown by teachers is matched by administrators’ support.
Reluctance among educational administrators in this regard highlights the shortcomings of the Ministry of Education and its training efforts and puts the onus on teachers to promote their subject.

Darnell and Hayhurst (2011) remind us of the tendency within SDP to position sport’s international organization and global popularity as universal rather than as historically and materially linked (p.185). The responses and observations from this study support the argument that sport and physical education are not as neutral as presented and consist of complex relationships that may reinforce hierarchies of power within the education sector and thus may sustain the dominance of Western organizations in SDP.

8.5 Recommendations

The 2006 Presidential Decree has exposed the vulnerabilities of the education sector and highlighted avenues for further exploration.

1. The rhetoric around the significance of HIV/AIDS needs to be matched not only by symbolic one-off workshops and training sessions but by tangible and sustainable administrative support at all levels of the education sector. This support and the Ministry of Education implementation of HIV/AIDS policies needs to be linked and regularly monitored for compliance with the policies of the Ministry of Health. Intergovernmental coordination remains vital to ensure that ad hoc approaches to addressing HIV/AIDS in the education sector do not undermine national efforts on the disease.

2. The role and use of traditional games in HIV/AIDS prevention and in Zambian education in general needs to be elevated, particularly as these games can promote a more culture-centred response to addressing HIV/AIDS, creating an approach that promotes community rather than individual responses. As Airhihembuwa and Webster (2004) have noted, when it comes to health behaviour research, public health intervention strategies based on individuals have failed Africans (p.6).

3. The Ministry of Education needs to re-prioritize how non-core subjects such as physical education are inspected and monitored.

4. The role of the Senior Education Standards Officer (SESO) needs to be re-evaluated, in particular the support the SESO provides to physical education.
5. The role of external stakeholders, while beneficial, needs to be carefully monitored and vetted. All external organizations should be licensed and required to pay a fee to work in any public school.

6. Further longitudinal research is required on the gender dimensions of increased interaction among students at schools implementing the decree.

7. The role of physical education contributing to inclusive education should be investigated, with support being provided to the Zambian Institute of Special Needs Education (ZAMISE) in how it tracks its graduates in the field.

8. As countries near 2015, the target year for attaining the Millennium Development Goals (MDGs) and Education for All (EFA), the debate about the next focus and priorities for development targets is an opportunity to design and plan more inclusive education systems (relative to pre-disaster) that are accessible to all members of society regardless of ability. Increasingly, these countries in the post-disaster period will need evidence from other settings with equally limited resources on which to develop such sustainable systems. This research provides evidence that sport for development can be an avenue for the development of inclusive education systems.

8.6 Future Research: A New Research Agenda

While many questions remain to be answered in sport for development, particularly if it is to be firmly embedded into mainstream development and educational policy, some areas clearly deserve further attention. Development literature is replete with the merits of understanding context, recognizing relations of power (particularly along lines of race) and working with, and not for, individuals. However, in practical terms, how this research can be incorporated into the day-to-day operations and interactions between education stakeholders (communities, teachers, administrators, NGOs) needs further analysis. A starting point is to foster a research culture among indigenous practitioners and scholars. Indigenous academic ‘role models’ can help here. The more practitioners see non-indigenous scholars conducting research in their communities, the more the perception is entrenched of research being the preserve of actors from the global North and of limited relevance to stakeholders in the global South. A cadre of indigenous scholars can bring a perspective that, to borrow from Weber,
allows for *Verstehen,*\(^{16}\) or the deep understanding of the indigenous application of, for example, physical education and traditional games in Zambian society. Drawing on seminal literature in sport for development (Coalter, 2006; Darnell, 2007; Darnell and Hayhurst, 2012; Donnelly, 2008; Giulianotti, 2004; Kidd, 2008), pertinent questions concerning “to what ends should sport and physical education be a key component in development policy” and “under what circumstances”, led by more scholars from the global South, can contribute to the field. More specifically, while this study points to the potential contribution of sport in ameliorated gender relations, further research is needed to draw conclusions about the robustness of this finding, and the reasons for it. This research could focus on the relational level of students outside of school, as Bajaj (2009) has recommended.

Such studies should focus on rural areas and special needs populations and explore the role of traditional games, while paying attention to how material conditions—poverty, race and power—are implicated in sport for development. Research that is linked to theory and the real world in such a way offers solutions to the limitations mentioned above and would be in line with Darnell and Hayhurst’s (2012) call for a decolonizing praxis in sport for development.

**8.7 A Final Word**

As a critical researcher, I was interested in exploring the historical, social, political and practical conditions that contributed to the development of the 2006 Presidential Decree and the use of physical education for HIV prevention in Zambia. This interest led me to explore the literature on Zambia, HIV/AIDS, education policy, postcolonial theory, sport for development and traditional games. Based on my reading of this literature, I posed a number questions that I sought to answer in my study. I therefore conclude by attending to the central question of the study and provide brief answers to the questions posed in the study objectives.

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\(^{16}\) *Verstehen* refers to understanding the meaning of action from the actor's point of view. It is entering into the shoes of the other, and adopting this research stance requires treating the actor as a subject, rather than an object of one's observations. G. Ritzer, ed. *Blackwell Encyclopedia of Sociology*, 2007, retrieved on August 26, 2010, from www.blackwellreference.com/public/book?id=g9781405124331_yr2010_9781405124331
8.7.1 Can Physical Education Deliver on the Goals of HIV Prevention?

Without conducting classroom observations, the data gathered is not sufficient to answer this question. Yet the findings raise questions that are worth exploring in future studies, particularly as related to how HIV prevention education has been interpreted and applied in Zambian education. To recap, HIV prevention education is:

- Offering learning opportunities for all to develop the knowledge, skills, competencies, values and attitudes that will limit the transmission and impact of the pandemic … including the impact of HIV/AIDS on the education sector, thereby preserving the core functions of the education systems.

(UNESCO 2004, p.5)

The study reveals that opportunities for learning about HIV prevention have increased, but poor planning and implementation have meant that this is not being realized across the education sector. The results are such that a definitive claim of physical education’s inability to deliver on the goals of HIV prevention education is not possible. The processes of development and implementation of HIV prevention through Zambian physical education have in many aspects undermined some of the favourable accounts of how physical education beneficially contributes to HIV prevention education.

8.7.2 What Does the Implementation of the Presidential Decree on Physical Education as a Strategy for Addressing HIV/AIDS through Physical Education Reveal?

While classroom observations would undoubtedly provide a rich insight into how the presidential decree is working as a strategy for addressing HIV/AIDS, the policy implementation literature was useful for understanding how decrees may be useful in addressing HIV/AIDS. A presidential decree communicates the significance of a particular issue and/or reinforces its primacy within an institution. Decrees can also be useful for bringing about behavioural change. These qualities are important in large bureaucracies and for addressing HIV/AIDS. As a strategy for implementing HIV prevention through physical education, observing teachers conducting lessons is essential to understanding how the decree works as a strategy for addressing HIV/AIDS. The limited data do point to the need for a clearly articulated plan in addition to a decree. A plan with clearly defined objectives is significant because bureaucracies such the
Ministry of Education are made up of thousands of civil servants and influenced by sociocultural and geopolitical forces (e.g., local customs and traditions, international development agendas, other institutions such as the World Bank).

8.7.3 What Should We Learn from the Response of Teachers and Administrators to the Implementation of the 2006 Presidential Decree?

The system designed to inspect, monitor and support teachers has largely failed physical education instructors. More needs to be done to raise the standard of what is expected of teachers, and this needs to be demonstrated regularly. Physical education teachers are equally responsible for the low status of physical education. Their inability to challenge the poor status and physical education’s domination by other subjects on the curriculum needs to be understood in the wider sociocultural context. A number of teachers are doing remarkable work in very challenging circumstances. These teachers have been innovative by introducing traditional games into their teaching and by including vocational skills such as the making equipment for traditional games. These activities engage students, which is important for HIV/AIDS education, and they also build social capital, particularly in rural areas where some parents have not been in favour of girls participating in physical education.

8.7.4 How Does the School Context Influence the Implementation of the Presidential Decree?

The school influences the decree by what the school community understands the objective of the decree to be and by the culture within the school. This has considerable bearing at the level of school planning, such as insisting time is not taken away from physical education during examination periods. Where the objective is poorly understood, schools are likely to retain the status quo in which physical education is marginalized within the school, with little or no change in the teaching of physical education and the allocation of resources towards it. In some cases, schools, and specifically teachers, will exercise discretion, such as including vocational activities to teach students how to make traditional games equipment as a strategy for complying with the decree. Some schools have fully embraced the decree, supporting its implementation by ensuring teachers have the necessary resources and by allocating space on the school timetable. The literature on education policy suggests that context (Ball, 1999; McLaughlin, 1987) is significant and,
specifically, that schools can mediate, critique and construct policies (Clune, 1989). The findings in this study support this view but also point to the need to consider the influence of the Provincial Education Office and the Education Standards Office.

8.7.5 Who Are the Key Personnel and What Are Their Resource Requirements?
Initially I had planned on using backward mapping, as advanced by Elmore (1979), to identify key personnel and their resources requirements. However, due to challenges during the research planning phase, I had to change this approach and adopt an abridged version of Elmore’s (1979) that still sought to locate the key individuals for the implementation of the decree. These individuals and their requirements are as follows:

1. **Physical Education Teachers**
   Ultimately teachers have the responsibility of communicating the message about HIV/AIDS and, by extension, about the goals of the decree. How teachers discuss, critically engage students and the quality of information they provide to students are important.
   Teachers need regular and updated in-service training specific to physical education with components of HIV/AIDS and traditional games. Additionally, the identification and championing of teachers addressing considerable challenges in rural areas is essential for motivating and maintaining teacher morale.
   As a collective, the Physical Education Teacher Association of Zambia (PETAZ) requires organizational support and mentoring (political acuity) from more established organizations such as the Zambia National Union of Teachers.

2. **Senior Education Standards Officer**
   The Senior Education Standards Officer (SESO) has the responsibility of ensuring education quality, among many other responsibilities. The SESO is significant for the morale of and professional support provided to teachers.
   The SESO requires training in how to inspect physical education generally and in how physical education can address HIV/AIDS. In addition to resources that enable the SESO to regularly inspect (at least once every two years), what is needed are more SESOs within the education sector, as the demands on the position have increased with the expansion of education access. Since the free
primary education strategy started in 2002, the numbers of SESOs have largely remained the same.

3. **Head of School/Principal**

   The head of school/principal is influential in the school culture. Additionally, the school head is responsible for school planning and for the allocation of resources to subjects such as physical education. The principal can benefit from participating in regular and targeted stakeholder engagement forums hosted by the Ministry of Education. These forums have the benefit of communicating the objectives of the decree, its underlying principles and its objectives.

4. **Provincial Education Officer**

   The Provincial Education Officer (PEO) is the administrative officer charged with ensuring the delivery of education standards within the province. This individual has considerable influence in promoting the education sector’s priorities and constitutes a vital link between the central policy arm of the ministry and the schools. Additionally, this individual provides administrative, moral and political leadership to the heads of schools. Similar to school heads, the PEO needs to participate in regular and targeted stakeholder engagement forums hosted by the Ministry of Education that communicate why the decree is important for their particular province and how it will contribute to national education targets.

5. **Parents**

   As guardians of students, particularly with regards to an issue such as HIV/AIDS, parents need to be engaged with and consulted as early as possible when potential controversial issues such as the discussion of sexuality or girls’ participation in physical education come up. Parents communicate the priorities for a child’s education, and with the dominant perception in Zambian society of physical education being an unproductive use of time, more needs to be done to articulate why the decree and physical education can contribute to children’s development.
Parents need to be encouraged to participate in parent-teacher associations and in schools, particularly in rural areas, where they need to be proactive in communicating and hosting events that link the school to the community. The literature on education decentralization cautions us to pay particular attention to issues of power between parents and school administrators, particularly in hierarchical societies such as Zambia, in which the sought-after critical feedback can be elusive, as individuals avoid being considered disrespectful or confrontational.

8.7.6 What Recommendations Arise from the Study Regarding the Strengthening of HIV Prevention Education?

Zambia, like many countries deeply affected by HIV, has been very vocal on the impact and implications of the HIV epidemic on the country. The rhetoric, however, needs to match the realities on the ground. A way of achieving this is by adopting strategies within education that provide information on exactly what is happening on the ground. Normally, this information should be fed through the system by the SESO and by the Curriculum Development Centre. Yet this does not appear to be the case. Policy planning and implementation appears uncoordinated and vague.

One-off workshops are not sustainable and reliable. The key issues of culture, gender and poverty with respect to HIV/AIDS need to be adequately addressed and not remain silenced under the cloak of supposedly respecting cultural traditions and practices. In-service training is paramount, as this is where strategies for HIV prevention can be imparted to teachers, simultaneously eradicating reliance on the teaching script. In-service training remains a great way to learn about what is happening in HIV prevention education. PETAZ can use this forum of bringing teachers together to write materials and to document how physical education can contribute to HIV prevention.
References


Jaouen, G. (2002). Education Stakes for the 21st Century Society through Inheritance,


Morrow, S. (2005). Quality and Trustworthiness in Qualitative Research in Counseling


University of Zambia and University of Toronto (2006). Workshop on the Use of Physical Education, Sport and Traditional Games and Movement Activities to


Appendix A: Initial Letter of Request for Authorization

15th July, 2009

Mrs. Lillian E. Kapulu
Permanent Secretary
Ministry of Education
P.O. Box 50092, Lusaka, Zambia.
Fax: 011-260-211-254139

Dear Madam:

Re: Request for authorization to undertake research study of the 2006 Presidential Decree on Physical Education

My name is Donald Njelesani and I am currently completing my Doctoral studies in Exercise Sciences at the University of Toronto. My supervisor is Dr. Bruce Kidd, Dean, Faculty of Physical Education and Health.

I am writing to request authorization to undertake a research study (in schools and MOE offices) to explore the development and implementation of the 2006 Presidential Decree of Physical Education as part of my thesis research.

My proposed study - HIV Prevention education through physical education: Does it deliver? - seeks to investigate how physical education and traditional games in Zambia is contributing to the realization of Zambia’s national development goals as espoused in the Fifth National Development Plan (FNDP). Specifically, the study will evaluate the implementation of the 2006 Presidential Decree establishing physical education as a compulsory and examinable subject, with a focus on preventive education about HIV/AIDS. My aim in particular is to examine the respective roles of the teacher and student in this program in addressing the impact of HIV/AIDS. Attached to this letter is a summary of the proposed study.

As part of the data collection for this study, I would like to conduct interviews and classroom observations between 15th September and 2nd December 2009 with administrators and teachers in offices and schools that have addressed the 2006 Presidential decree. To this end, I am requesting authorization to enter Ministry of Education offices and schools to conduct interviews and observe staff and students. Specifically, I would like to conduct my data gathering at the following departments/institutions:

MOE Headquarters
1. Standards and Curriculum

Provincial Education Offices
1. Central 2. Eastern
3. Lusaka 4. Southern

Teacher Training Colleges
1. Chalimbana Teacher Training College, Lusaka
2. Chipata Teachers College
3. David Livingstone College of Education, Livingstone
4. Nkrumah Teachers College
Schools

1. Kabulonga Boys Secondary School, Lusaka
2. David Livingstone High School, Livingstone
3. Feni Day High School, Chipata
4. Kabwe High School, Kabwe

I remain mindful of the day-to-day challenges and great effort involved with the delivery of education in Zambia by the staff of the Ministry of Education. To this end I welcome any suggestions that either you or your staff may have for me that may limit any potential disruption to their work and how my study may contribute to ongoing discussions of a revitalized national curriculum within physical education.

Should you require further information or clarification, kindly let me know.

I look forward to your favourable consideration to this request.

Yours sincerely,

Donald Njelesani
PhD Candidate,
Department of Exercise Sciences, Faculty of Physical Education & Health,
University of Toronto
Toronto, Ontario, Canada
Tel: (647) 897-6460 Fax: (416) 946-7910
Email: donald.njelesani@utoronto.ca
cc

James Swilimba, Chief Education Office – Teacher Education
Lazarous Kalirani, Senior Curriculum Specialist - Curriculum Development Office
Musheke Kakuwa, Advisory Unit for Colleges of Education, UNZA
Bruce Kidd, Dean, Faculty of Physical Education and Health, University of Toronto
Appendix B: Ministry of Education Official Response / Granting of Permission

MOE/101/35/19

4th August, 2009

Mr. Donald Njelesani,
Department of Exercise Sciences, Faculty of Physical Education and Health,
University of Toronto,
ONTARIO, CANADA.

RE: REQUEST TO CARRY OUT RESEARCH

The letter refers.

I would like to acknowledge receipt of your letter requesting for permission to carry out research on the teaching of Physical Education.

I have no objection to the request and therefore permission is granted for you to do your research in the respective institutions.

Kindly, avail the Ministry a copy of the report after you have completed your studies.

Dr. James S. Mulungushi
Permanent Secretary – Education Services, Standards and Curriculum
MINISTRY OF EDUCATION.

c.c. Permanent Secretary, Human Resource and Administration

/ac.
MOE/101/35/19

12th October, 2009
The Provincial Education Officers
LUSAKA PROVINCE

RE: REQUEST TO CARRY OUT RESEARCH

The letter refers.

The student named Donald Njelesani is pursuing studies in Physical Education and Health at the University of Toronto and is currently on research. Permission has been granted for him to conduct research in the stated field of study in the schools which are in your Province. This is on condition that his activities do not disrupt the teaching and learning programmes in schools. The student should be able to avail the Ministry a copy of the report after completion of his study programme.

Your cooperation is appreciated and I thank you in advance.

[Signature]

Mfula F.C. (Mrs.)
A/Permanent Secretary - ESS & C
MINISTRY OF EDUCATION
Appendix C: Final List of Schools Included in Study

1. Arakan High School
2. Chilanga Basic School
3. Chongwe Basic School
4. Chongwe Basic School
5. Curriculum Development Centre
6. Jacaranda Basic School
7. Kasenje Basic School
8. Kaunda Square Basic
9. Lotus Basic School
10. Luangwa High School
11. Lusaka Girls Basic School
12. Mwavi Basic School
13. Naboye High School
14. Olympia High School
15. University of Zambia
16. Woodlands A Basic School
17. Zambia Institute for Special Education
Appendix D: Consent Form

Informed Letter of Consent

Dear Participant

My name is Donald Njelesani and I am currently completing my Doctoral studies in Exercise Sciences at the University of Toronto. I am writing to invite you to participate in a research study to explore the development and implementation of the 2006 Presidential Decree of Physical Education as part of my thesis research. My proposed study - **HIV Prevention education through physical education: Does it deliver?** - seeks to explore how teachers have responded to the Presidential decree at the local levels and how this contributes to the national development goals as espoused in the Fifth National Development Plan (FNDP).

In order to find out about the impact of the Presidential Decree, I would like to invite you to participate in a one-to-one interview. You will be one of 12-16 physical education teachers and administrators from Eastern and Lusaka provinces interviewed as part of this study. You do not have to have participated in the 2006 Workshop on Physical Education where the Decree was pronounced. If you decide to participate in the study, you will be asked to share your experience and perspectives on the Presidential decree.

The interview will be held at a time that is convenient for you and will take approximately 60 - 90 minutes. I will provide reimbursement for any transportation cost that you occur on the way to and from the interview, as well as provide for a meal and beverage should conducting the interview outside your school/work be more convenient and appropriate.

With your permission, the interview will be digitally (audio) recorded as to not miss any information. Please be assured that the information you provide will be held in strictest confidence at all times. Only myself and my three research supervisors will have access to the raw data collected from the interviews. Based upon the recording I will make a typed transcript that I will save on my laptop and it will be protected by a password. All audio recordings will be stored in a locked cabinet both during my stay in Zambia, as well as at a locked cabinet at my graduate student’s office at the University of Toronto when I return to Canada. After 7 years I will destroy of all the information by dubbing or deleting the audio-recordings, and shredding paper transcripts and deleting transcripts saved on my laptop. Please be assured that your identity will remain anonymous through the use of a pseudonym and the elimination of any identifiable information.

If you agree, in addition to the interview, I would like to observe a physical education class that you teach. This observation can occur on your regularly scheduled day for Physical education instruction. I appreciate your demanding schedule and if appropriate, we can schedule the interview and class observation on consecutive days. You can choose to only participate in the interview with no consequences or penalties. Similar to the interview, no identifiable information will be used in observations.

Your participation in this study is completely voluntary. You may choose to withdraw at any time without negative consequences, and you have the right not to answer any question or any parts of the interview/observations process. This study has no known risks that may affect you, the participant. Should you have any questions or concerns regarding your rights as a participant, you can contact the Office of Research Ethics at the University of Toronto by email at
In the past, participants have appreciated knowing that their experience and perspectives will contribute to improving education practice and they have felt that they have gained valuable insights about their practices. If conducting the interview outside your school/office is more convenient/appropriate, I can reimburse your transport costs to/from your school.

I appreciate you considering my invitation to participate in this study. Should you have any questions or concerns, I would be pleased to answer your questions in person or over the phone. If you agree to participate, please sign the attached form.

Sincerely,

Donald Njelesani,
PhD Candidate
Faculty of Physical Education and Health, University of Toronto
0975 – 495 – 790
donald.njelesani@utoronto.ca

I have read and understand the above information about the Reduced Class Size Research Project.

I therefore give consent to the following:

I agree to participate: ------- or I do not agree to participate: ------

I agree to be audio-taped: -------

I agree to participate in classroom observations: -------

or I do not agree to participate in classroom observations: ------

________________________________  ________________________________
Signature  Date

________________________________  ________________________________
Print Name  School/Department

Researcher signature:________________  Date:__________________________
Appendix E: Interviews Guide/Schedule

(The interviews will be semi-structured and incorporate emergent themes in subsequent interviews that are addressed to participant one level up in the education hierarchy. The researcher will also be conscious not to go beyond the outlined suggested interview length outlined in the recruitment process.)

1) Can you tell me about your experience in education and your current position?
   Probes:
   • Years as PE Teacher
   • UNZA/Mr. Kakuwa
   • Specialty
   • Theme/topics/syllabus

2) Have you attended any workshops/trainings on the use of sport and traditional games for HIV/AIDS prevention?
   Probes:
   • Where
   • When
   • Major lessons
   • Contributions/participation in reform of profession/practice/lesson plans

3) When did you find out about the Presidential decree on physical education?
   Probes:
   • When
   • Who / How
   • Resources
   • Was this viewed as an opportunity? & or/requirement?

4) Can you tell me what you understand the goals of the Presidential decree to be?
   Probes:
   • What are the issues/problems trying to be addressed?

5) How if at all, have you changed the way you teach physical education as result?
   Probes:
   • Changes in frequency pre/post decree
   • Theme/topics/syllabus
   • Training

6) Can you share with me what kind of support if any, you have received to implement the decree?
   Probes:
   • Do you need support?
   • What resources are essential?
   • Does education hierarchy allow for this?

7) How is the Presidential decree important for your school and for your students?
   Probes:
   • What are the HIV/AIDS related challenges in your school
• How does the decree fit in with the rest of the curriculum?
• Complement life skills /health/HIV lessons
• Reaction from other subjects/tensions/supports

8) Can you share with me any experiences you have of physical education and traditional games addressing the important issues for your school and students that you mention (Q.7) Probes:
• Do the games address the challenges?

9) Can you share with me some gender specific challenges and opportunities within your school/community? Probes:
• Class composition
• Appropriateness of activities
• Participation

10) Can you share with me some gender specific experiences of how the decree may have addressed these challenges and opportunities within your school/community?

11) In what ways, if at all, has the teaching of physical education as a preventive education about HIV/AIDS been problematic?
• Materials
• Tensions/compromises
• Training

12) How would you describe a successful lesson in physical education and traditional games with respect to HIV/AIDS?
• Student engagement
• Correct identification of key theme/issues in HIV/AIDS prevention

13) Can you tell me about how students engagement in you class?
• How do you know?
• What is most popular/not liked with students?

14) In your school, what factors/issues allow for you to have a successful lesson in physical education and traditional games about HIV/AIDS prevention?
• Administrator support
• Resources
• Students

15) Which individual (from the school to headquarters) do you consider significant for you to be successful in teaching physical education and traditional games about HIV/AIDS prevention?
• Principal/Headmaster
• Teacher
• CDC
• Mr. Kakuwa
16) How would you describe the teaching environment in your school?
   • Administrative support for experimentation / new ideas
   • Interaction with other teachers
   • Involvement in non-curricular programs

17) Can you tell me about any involvement with your local community with regards to teaching of games and HIV/AIDS?
   • PTA
   • Village communities

18) Can you tell me about your interaction with the provincial education office with regards to the teaching of physical education and traditional games and HIV/AIDS prevention?
   • Inspectors
   • Resources

19) How can the provincial education office and Ministry ensure that you regularly have a successful lesson?

20) Is there anything else I need to know about your teaching and the presidential decree?
Appendix F: Interview Script

(To be used when approaching potential participants and will be shared verbally through the phone or face to face with potential participants)

Good morning/afternoon Madam/Sir,

My name is Donald Njelesani, a student in the Department of Exercise Sciences at the University of Toronto in Canada. Mr. Lazarous Kalirani from the Curriculum Development Centre provided me with your contact information. As part of my PhD studies, I am researching the response of physical education teachers to the 2006 Presidential Decree on physical education. I am particularly interested in exploring how teachers have responded to the Presidential decree at local levels and how this contributes to Zambia’s national development goals as espoused in the Fifth National Development Plan (FNDP).

As a current physical education teacher, your experiences and perspectives would greatly inform my research. I would like to find out if you would be interested, depending on your schedule, in participating in an interview regarding this topic. If you are agreeable, in addition to the interview, I would like to observe one of your classes in physical education. The observation is meant to illuminate the findings from the interview and you choose not to participate in the observation with no consequences for the interview.

I aim to interview 12-16 physical education teachers from Eastern and Lusaka provinces. The interviews will range between 60-90 minutes and will be scheduled at a time that is convenient for you. You may suggest a place for the interview either at your school or elsewhere.

With your consent, the interviews will be digitally (audio) recorded and a typed transcript will be made of the interview. All recordings and transcripts will be stored and locked at all times both in Zambia and in Canada at the University of Toronto.

The interview questions are designed to explore your insights and experiences of the Presidential decree and not to coerce you to disclose information that is not offered voluntarily. You have the right to pass on answering any question and can at anytime, stop the interview, refuse to answer questions or withdraw from the research study. Upon withdrawal, I will destroy all audio recordings and/or transcripts.

Participants may or may not receive any direct benefits from their participation in this research. The findings and recommendations of this study will be presented to the Ministry of Education. Should the Ministry adopt these recommendations, this may shape how physical education is administered and instructed within Zambian schools. Given the relatively small physical education community in Zambia and that I am only interviewing up to 16 participants, there is potential indirect benefit to participants of knowing that they have contributed to improving practice within the physical education community and gaining deeper insights into their own responses to the decree.

There are no perceived risks to participants and steps will be ensured your anonymity through out the course the research study such that when the research is published, locations and names will be changed.

The data collected in this research will be used for completing my PhD thesis at the University of Toronto in Canada. Summaries of this research may be presented at conference, workshops and
public events. There may also be opportunities for the research to be published in academic journals, or in more user-friendly guides to share with interested stakeholders in the physical education community.

If you are interested in participating in this project, please feel free to contact me through phone (0975-495-790) or email (Donald.njelesani@utoronto.ca) or even suggest a meeting time now.

Thanks you for your time.
Appendix G: 2006 Presidential Decree/Ministry of Education Circular

9th February, 2006
Circular No. 1 of 2006

TO: Provincial Education Officers
    Principals, Colleges of Education
    District Education Board Secretaries
    Headteachers

RE: TEACHING OF PHYSICAL EDUCATION IN ALL INSTITUTIONS OF LEARNING

Reference is made to the above captioned subject.

You are all aware of the Presidential directive on the teaching of Physical Education in all schools which was issued in June 2005 in Livingstone and the reminder by His Excellency the President Mr. Levy Patrick Mwanawasa (SC) on 8th February 2006 on the same subject when he officially opened the Regional Conference on Physical Education at the University of Zambia.

I therefore direct you to with immediate effect implement the teaching of Physical Education as contained in our syllabi:

1. The Zambia Basic Education Syllabus, Grades 1-7
2. The Zambia Basic Education Course (Physical Education Syllabus) Grade 8-9
3. The Physical Education Syllabus for High School (Grades 10-12) Provincial Education Officers, District Education Board Secretaries and their Standards Officers should personally monitor the teaching of Physical Education to all pupils and students and ensure the appearance of Physical Education on School Timetables in all the Institutions of Learning, without fail. Schools should not replace Physical Education with other subjects.

Please note that the teaching of Physical Education is to ensure Physical Fitness of the learner and need not involve expensive equipment. Additionally, it need not necessarily be taught for examinations purposes only but should be taught for enhancement of values, skills and a holistic development of the learner.

Heads of institutions are directed to personally ensure the implementation of the teaching of Physical Education in your institutions of learning.

I expect strict adherence to these instructions.

L.E. Kapulu (Mrs)
Permanent Secretary
MINISTRY OF EDUCATION

c.c. The Honourable Minister of Education
   The Honourable Deputy Ministers, Ministry of Education
   Secretary to the Cabinet, Cabinet Office
   All Provincial Permanent Secretaries
   All Directors, Ministry of Education (HQ)
Appendix H: University of Toronto Ethics Approval

University of Toronto
Office of the Vice-President, Research
Office of Research Ethics

PROTOCOL REFERENCE # 24376
October 2, 2009

Prof. Bruce Kidd
Faculty of Physical Education and Health
55 Harbord St.
Toronto, ON

Mr. Donald Njelesani
Faculty of Physical Education and Health
55 Harbord St.
Toronto, ON

Dear Dr. Kidd and Mr. Njelesani:

Re: Your research protocol entitled, “HIV Prevention Education through Physical Education: Does it Deliver?”

ETHICS APPROVAL

| Original Approval Date: October 2, 2009 |
| Expiry Date: Oct 1, 2010 |
| Continuing Review Level: 1 |

We are writing to advise you that the HIV Research Ethics Board has granted approval to the above-named research study, for a period of one year. Ongoing projects must be renewed prior to the expiry date.

All recently submitted documents have been approved for use in this study.

Any changes to the approved protocol or consent materials must be reviewed and approved through the amendment process prior to its implementation. Any adverse or unanticipated events should be reported to the Office of Research Ethics as soon as possible.

Please ensure that you submit an Annual Renewal Form or a Study Completion Report at least 30 days prior to the expiry date of your study.

If your research has funding attached, please contact the relevant Research Funding Officer in Research Services to ensure that your funds are released.

Best wishes for the successful completion of your project.

Yours sincerely,

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