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A Capability View of Success in Quintile 1 Schools in South Africa

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ABSTRACT The success of Quintile 1 schools in South Africa has attracted many diverse interpretations especially as the single variable of Grade 12 results are commonly used as the yardstick to compare performance between schools. Although this approach serves a purpose, it can also be misleading as these results provide a simplified snapshot of success, leaving the actual process of achieving success as a wide terrain open to contestation. In this paper the researcher attempts to contribute to these views by problematizing success from the perspective of Quintile 1 schools using a capability analysis based on Amartya Sen's normative framework. The paper shows that understanding capabilities and functioning, as described by Sen brings into focus both philosophical and practical reasoning about success in South African schools. The application of the capability approach in educational analysis has been fairly limited, but the paper shows that it does provide robust theoretical constructs to evaluate social justice issues differently.

INTRODUCTION

Because of its unique history, the South African educational system exhibits highly contrasting features of success (infrastructure, management, enrolment, attendance, retention, pass, and progression rates). The dominant role history plays in the educational system influences the way one views, perceives, interprets and evaluates these features in terms of educational success. These are important signposts that when missed or misplaced, affect the understanding of the realities in schools. This occurs when these features are analyzed either varyingly or in isolation, while ignoring the fundamental role history and other salient factors play in their formation, in effect changing or distorting their meanings. The way school success is perceived, defined and measured is an ongoing debate both among and between policymakers and scholars. The debates about success often revolve around what is evaluated, why it is evaluated, who evaluates, for whom it is evaluated, when it is evaluated, the methods of evaluation, the tools of evaluation and where the evaluation takes place. This explains why the performance of Quintile 1 schools in South Africa for example, has attracted varying perceptions, commentaries and interpretations.

Success in education, as evidenced by available literature, is a longstanding debate among scholars, especially with regards to how it should be defined, measured, appreciated and to its actual contributory factors (Pritchett and Filmer 1990; Miller 1994). Success tends to be an educational yardstick that is applied depending on available circumstances and objectives at hand (Kenny 2001). Some notion of success is often used as a tool to evaluate the progress or state of educational institutions. This is frequently done by comparing the progress of educational institutions over a period of time in various domains such as attendance, retention and pass rates. In South Africa, for example, Grade 12 results are commonly used as a yardstick for the measurement and comparison of progress and performance between schools (Cele 2005). Although this approach assists in understanding gaps between schools, it could be misleading as the results give a rather superficial picture of the success rates of learners and schools. This is of concern because South African schools have different institutional constraints that influence performance and features that are often neglected in the analysis of success.

According to Behr (1988), the history of any educational system should be considered seriously because it plays an important role in shaping educational policies of the period in question. Similarly, Miller (1994) indicates that understanding the history of the institution in question is important as it allows a comprehensive analysis of the issues and allows particularities to come into play. There is broad consensus

that South Africa's history of economic and social inequality resulting from the apartheid dispensation still impacts the present educational system when assessing school success (Jackie and Johann 1998; Motala et al. 2007). The need to redress the imbalances of the past has given rise to different Schools Acts and amendments, including Act No. 84 of 1996, the 1998 National Norms and Standards for School Funding and the 2006 Amended National Norms and Standards for School Funding (Department of Education 2006). The 2006 document is the most significant to this argument as it provided the groundwork for the "Quintile" school system and its contestations. Given this historical background, this paper delves into the notion of success in Quintile 1 schools from the perspective of capability conversion.

THE QUINTILE SYSTEM AND SUCCESS

The 2006 Amended National Norms and Standards for School Funding came into existence following the imperatives stipulated in the 1996 Schools Act and the 1998 National Norms and Standards for School Funding (Department of Education 2006). The architects of the 2006 document made it very clear that providing resources to schools based on equitable distribution, as recommended by the South African Schools Act No.84 of 1996 Section 34(1), would mean enacting a pro-rich policy that was contrary to the aims and objectives of the democratic government (Department of Education 2006:10-11). Although an equity measure came into play in 1998 (Christie 2008), it fell short of resolving the educational inequality prevalent in South African society. The endeavor to rank schools according to a poverty index and to redirect a small part of the budget, approximately five percent, from rich to poor schools still proved insufficient. As Christie (2008) explains, the intention of the democratic government post-1996 was primarily to overcome the injustices of the past by striking a balance within the South African society in general and the schooling system in particular. It was thus clear that the equitable distribution of resources meant that middle class schools that were advantaged in the past would continue to amass more resources to the detriment of poor schools, while poor schools "…are expected to achieve the same levels of learning and teaching…" (Department of Education 2006:10-11). In effect, a new mechanism was needed to be put in place to achieve the aims and objectives of the democratic dispensation. Such arguments fall within the philosophy of the capability approach, which advocates that schools from different historical and socio-economic backgrounds need to be given different amounts of resources to enable them to develop at a rate that would lead to a targeted outcome. It was following the need to allow previously disadvantaged schools to catch up with their affluent compatriots that the "Quintile" system was designed in 1998. However, the practicality of these endeavors by the government and other stakeholders remains contested within the South African school system.

According to the Quintile system, the poorest schools are entitled to a greater share of available school resources. Schools were classified into five Quintiles. Quintile 1 consists of the poorest schools, while Quintile 5 comprises the least poor, that is, those schools located in affluent areas with excellent facilities (Department of Education 2006:50). According to the 2006 document, only schools located in townships, deep rural areas, or informal settlements, and particularly serving the residents in the areas in which they are located, could qualify to be ranked within the first Quintile or highest subsidy levels (Department of Education 2006:50). At this point it should be noted that despite the clear demarcation of Quintiles and of who gets what, the interpretation and application of the Quintile system is still a fiercely contested terrain (Hall and Giese 2009), as resources are not the only reliable indicator of school success.

Based on this discussion, it is evident that the understanding of school success could be subject to inconsistencies and distortions, if generalized. This explains why Sorensen (1994) emphasizes the risk of applying general success of pass, retention and enrolment rates as a yardstick for evaluation because these tend to vary among states and societies. Schools within the same communities, operating within the same context, are prone to exhibit different rates of success even in cases where they are found to have similar resources and where learners experience relatively similar learning conditions. These differentials could mean that different tools should be used for the measurement of school success in different societies based on local realities. Amartya Sen (1985, 1992) advo-

cates the importance of taking local realities into consideration when assessing well-being, because what is perfectly suitable in one space might not in another. This is why explaining the reasons for success in South African schools is a multifaceted phenomenon that should consider different approaches.

In order to understand and appreciate these anomalies in school performance, the researcher presents Sen's capability approach as an alternative way to identify success in poor school communities. Sen's approach takes into consideration more than one factor when appreciating characteristics exhibited by a particular society or institution within a particular time and space (Sen 1985, 1992).

THE CAPABILITY APPROACH AND EDUCATION

The human wellbeing factor that underpins the capability approach (Sen 1985, 1992) has strong potential to apply to education, which, however, still needs to be properly exploited by researchers within this domain (Saito 2003). Otto and Ziegler (2006) assert that despite the strong potential for explaining educational performance, the capability approach took a considerable amount of time to gain interest from an educational perspective. In recent years, education as a discipline has increased its usability of the capability approach as a framework for theorizing, implementing and evaluating social policy as a matter of social justice (Walker 2006; Unterhalter et al. 2007). This is because the capability approach focuses on what people are able to do and to be, rather than on their material possessions. Despite its value from an educational perspective, there are a number of debates about its actual impact as a framework on education as a discipline.

Firstly, education as a discipline is seen to be underspecified and under theorized within the capability approach (Walker 2006). The approach does not spell out a clear list of capability sets that particularly focus on education (Nussbaum 2000). Secondly, how education should be evaluated in terms of what should be measured and the definition of educational equality and inequality is still fiercely contested among scholars and policymakers (Unterhalter et al. 2007). These claims, however, ignore the strong consensus that exists in terms of the relationship between resources and achievement as established by Sen (1992). Thirdly, despite the strong explanatory relationship that potentially exists between the capability approach and education, it is argued that Sen never wrote from an educational perspective, and that since the theory has an economic and philosophical orientation, it is difficult to align it with education (Robeyns 2006, 2008; Nussbaum 2000; Walker and Unterhalter 2007).

Furthermore, it is argued that although Sen portrayed the relationship between resources and performance, he did not take into account the complex settings in which schooling takes place (Saito 2003). It is suggested that this shortcoming makes some of the principles of the approach, such as freedom (which is the range of options people have in deciding what kind of life to lead), inapplicable to minors within the education setting (Unterhalter et al. 2007; Saito 2003). This statement is based on the fact that if a child is allowed to choose what to do and not to do at an early age, this could result in irrational decisions that might negatively impact the child's future. As a result, the application of the capability approach to children appears complex and challenging, especially within the space of education. However, according to Saito (2003), Sen acknowledged these gaps and maintains the need for parental intervention with regard to the capabilities of children who may be too young to take rational decisions on their own. Considering these gaps, Unterhalter et al. (2007) revealed that ambiguities regarding the relationship between freedom and wellbeing should be guided by the ways in which individuals, using the capability approach, define wellbeing—an issue addressed by Sen (1992) in his acknowledgement of existing discrepancies within the approach.

Despite these criticisms, the capability approach does effectively illuminate the critical relationship between resources and success in different institutions, including educational institutions. The approach makes it clear that the availability of resources in any institution should not be seen as a direct predictor of achievements, because resources have to pass through a stage of conversion that could be influenced by space and freedoms to achieve. Performance levels of institutions could therefore be complex to understand if the nature of the conversion processes is ignored. Therefore, the need to ex-

plore the inability of schools (Quintile 1 schools in this case) to progress or succeed despite the provision of resources using the capability approach is the focus of this paper.

A SHORT CRITIQUE OF THE CAPABILITY APPROACH

The capability approach was influenced by the works of Adam Smith, Aristotle and most importantly, the Rawlsian Theory of Justice. According to Sen (Sen 1989; 1992; Nussbaum and Sen 1993), the Rawlsian theory, although a major influence on the capability approach, views primary resources as the main determinant factor of human well-being, which Sen considers a major limitation in the measurement of human well-being. Furthermore, although Sen's capability approach was established based on welfare economics and philosophical perspectives, it has been developed in a broad interdisciplinary and multidimensional framework through policy application and adaptation (Robeyns 2002, 2003, 2005a, 2005b, 2006, 2008; Nussbaum 2000; Kuklys 2005; Walker and Unterhalter 2007). Sen's original proposal entails choosing a capability set based on circumstance, space and goals, which has been criticized for its failure to provide a specific set of capabilities and list of functioning, a gap that Nussbaum has attempted to fill through development of a standard set of capabilities (Nussbaum 2000, 2003). In addition, Robeyns (2005, 2008) asserts that the limitations of the capability approach impacts its usability since scholars and policymakers encounter difficulties regarding its interpretation and implementation. Sen (1989, 1999) acknowledges the existence of discrepancies in the approach and argues that allowing selection of specific capabilities based on specific contexts and goals should lead to more flexible interpretations and outcomes. Sen (1989: 45) reiterates, "In social investigation and measurement, it is undoubtedly more important to be vaguely right than to be precisely wrong." Other criticisms of the approach are its lack of clarity in interpretation and operationalization, which can distort its usefulness in the analysis of social policy (Chiappero-Martinetti and Moroni 2007; Alkire 2008 and Goerne 2010), and the lack of an interpretative relationship between individual capabilities and the social structure.

Despite these criticisms, the capability approach is viewed as a tool for both empirical and practical applications in social policy analysis (Satio 2003; Walker 2007). This is because the approach allows for application in different fields of study since it provides an innovative approach for understanding equalities and inequalities through its key concepts. Alkire (2008) asserts that being a work in progress, the capability approach gives scholars and researchers an opportunity to develop various applications based on their interest. In this regard, the approach, rather than explaining poverty, inequality, and well-being, provides concepts and a framework for the conceptualization and evaluation of social policies. This explains why Robeyns (2003) holds the view that the approach should be seen primarily as a framework for thinking about normative issues, which in effect could be loosely defined as a paradigm, which can be adapted by various disciplines including education, sociology, applied welfare and development economics, development studies, as well as social and public policy analysis.

THE CAPABILITY APPROACH AND SUCCESS IN POOR SCHOOLS

The capability approach is underpinned by the fundamental constructs of capabilities, functioning, conversion and freedom. According to Sen (1992), capabilities are the abilities one has to achieve for functioning that are worth valuing in life. Here, attention is paid more to the freedom one has to achieve than on the means to achieve functioning. Sen (1992) postulates that even where equal resources are provided and barriers or constraints to achievements are not considered serious, there are possibilities of variations in outcomes. This is precisely the phenomenon this paper intends to investigate in the case of Quintile 1 schools in South Africa. For Sen (1985), functioning represents actual achievements, that is, what a person can do or can be. If the nature and value of these achievements are examined carefully it would be possible to reveal inequalities that exist in people's freedom to achieve (Sen 1992). Sen (1985) postulates that although accumulation of resources is important to human existence and growth (development), what one succeeds in doing with available resources should be of utmost importance. Sen argues that two persons (or institu-

tions) cannot be compared based on the amount of commodities accumulated, but on what they succeed in doing with the available resources based on their constructed and adopted capability sets. How schools make resources useful to themselves is an important point of departure usually ignored in the analysis of the success or performance of Quintile 1 schools. To Sen (1985), converting available commodities or resources into achievements (functions) is influenced by a variety of factors that could be both internal and external depending on the individual or the institution.

Sen's approach shifts away from the mainstream assumption that resources equal achievements, by focusing on the ability to function as a way of understanding the nature and causes of determining factors such as poverty and deprivation (Sen 1992). From a traditional viewpoint, the achievements of individuals are assessed based on the amount of resources at their disposal while ignoring pertinent but salient variables (internal and external characteristics) of that individual or institution. These characteristics differ between people and institutions because every person or institution is unique. The capability approach thus accommodates the diversity of people and institutions, which according to Sen (1985, 1992), plays a dominant role in the understanding and assessment of equality and inequality. Sen (1992) argues that diversity enables people or institutions to progress differently, even in cases where the same amount of resources are made available.

To apply Sen's logic crudely to the issue of how one should understand and evaluate educational success in poor school communities, would suggest that a standardized assessment of success is impossible, because everybody or every school should perform differently. However, a more detailed application of Sen's logic will allow one to consider the national Department of Education's obligation to gauge how schools perform while at the same time acknowledge that these comparisons should only serve a particular purpose. In other words, one cannot only compare the final functioning (for example, in this case the performance of the schools in terms of pass rates) without considering the variation in capability sets at play in education and in these schools. Researchers are in general agreement that policy implementation is affected by the context in which policies are implemented (Taylor et al. 1997). Policies that work in one context may fail in another. Taylor et al. (1997) also state that the socio-cultural, socio-economic and socio-political conditions of the implementing agency shape the outcomes of policy implementation.

Socio-cultural and socio-economic factors affect the way policies are implemented. For example, Stofile (2008) asserts that the inclusive education policy requires that parents must be involved in the education of their children. However, existing socio-cultural factors can prohibit the full implementation of policies. In some cultures women occupy subordinate roles in society and cannot be centrally involved in the education of their children. In other cultures, learners with disabilities are regarded as a family curse and are prohibited from attending school or participating in activities of so-called 'normal' children. Also, large numbers of people in rural areas live in very challenging conditions where some families expect their schoolgoing children to leave school during harvest time and participate in economically productive activities. The struggle to access resources can become a major factor in the maintenance of sound and harmonious family relationships, which impacts the schooling of affected children. The contexts within which schools and their pupils operate therefore have huge implications for the implementation of policies and the learning processes. Therefore, comparing school results can only serve the purpose of an average gauge of performance at best.

Comparing success and performance of schools based on the input of resources, which is facilitated by the categorization of schools in five Quintiles in South Africa, can also present its own set of challenges. Attending to the inequalities of the past via the current Quintile system addresses only the provision of resources, but not necessarily the application of these resources to optimally create and sustain a sound or desired teaching and learning experience. According to Sen (1992, 1999), existing variables, which include differences in physical and mental abilities, age, sex, social background and environmental contexts (which include the impact of the societies and communities where one lives and how these impact opportunities) are capable of influencing the abilities to achieve functioning that determine lives and therefore schooling experiences. This capability argument holds

that the measurement of success should make provision for the salient characteristics, which derive from the socio-cultural, the socio-economic and the socio-political contexts.

Furthermore, Sen (1985,1992) reiterates that besides the existence of personal and external characteristics that influence the measurement of equality and inequality, the purpose of measurement (motivations), choice of variable(s) and the spaces in which the different persons or institutions are to be compared should be taken into consideration. These characteristics combined affect a person's ability to transform available resources into achievement, and is what Sen calls the "conversion process" (Sen 1985). In other words, success and performance should also be viewed from the standpoint of the particular institutional or school context. Factors such as the capabilities of the principal and the inter-social variations of the staff must be considered in order to understand the nature of a school's performance, with resources directed to enhance this capability in schools regarded as low performing. Sen's conversion process can therefore be applied to schools because it demonstrates the fact that different people or institutions (schools) with the same amount of resources are more likely to convert them at differing rates within the same time frame. This approach maintains that for resources to be converted into achievements, the capabilities possessed by all role players in the conversion process play a very important role in determining well-being. In this case, well-being can be regarded as conforming to the optimally accepted levels given the nature of the conversion processes at play in a school community. Sen (1992, 1999) asserts that the possession of resources does not guarantee an improvement in the well-being of an individual or a group because of the difference in space.

Therefore, understanding the differences in spaces and existing variables can assist in providing answers as to why different institutions at the same stage of development, within the same community and with the same amount of resources exhibit contrasting levels of achievement. Therefore, if the success rate among institutions is to be compared with an aim of achieving objective results, the yardstick of measurement should take into consideration the existence of different variables and spaces within the institution. The capabilities and achievements in relation to available resources provide an insight into why people 'succeed' and why they 'fail' (Terzi 2005).

Freedom to achieve can be influenced by both internal and external circumstances, the deployment of different tactics and strategies and the liberty to choose varied functioning bundles based on specific goals. This is because human diversity influences the relations between different spaces, thus equality in one space could mean inequality in another space. Sen (1992) places emphasis on the importance of space by asserting, "The need to face explicitly the choice of space is an inescapable part of the specification and reasoned evaluation of the demands of equality." The existence of human diversity and different spaces affect the way in which income, resources and primary goods are converted into achievements. Inequality will occur in circumstances where some individuals or institutions may process resources, primary goods or income, but may not have the abilities or freedoms to convert them into achievements. It is not uncommon to observe that different people may have difficulties of varying magnitudes in converting available resources into achievements. As a result, it becomes clear that,

The extent of real inequality of opportunities that people face cannot be readily deduced from the magnitude of inequality of incomes [resources], since what we can do or cannot do, can or cannot achieve, do not depend just on our incomes [resource] but also on the variety of physical and social characteristics that affect our lives and make us what we are (Sen 1992).

As a consequence of this potential for inequality, it is important to seriously consider the gap between resources that lead to freedom to achieve and the nature of the achievement itself. Sen's capability approach in this respect provides an opportunity to consider the qualities or varied characteristics of those in charge of converting resources into actual freedoms to achieve. Understanding the nuances within the space of Quintile 1 schools could illuminate or change the current perception towards the performance of these schools.

Sen (1992) reiterates that many of these freedoms to achieve could be available, but seriously limited, especially in situations where the individual or institution in question has the ability to get what they value, but do not directly oper-

ate the levels of control. This is common with institutions that have the ability to institute certain changes that could possibly lead to success, but are limited or compromised. For example, by government policies or rules of School Governing Bodies (SGB) that specify the procedures that must be followed. An example of this is the ability of certain school communities (school governing bodies) to afford to appoint and remunerate extra teachers to lighten the load of teaching, administration and extramural activities. Extra teaching resources can lead to smaller classrooms (a clear indicator of classroom success), more eyes to maintain order and safety, more non-teaching periods for teachers and a calmer, educationally sound atmosphere, which benefits staff and learners. Comparing this to school communities, which do not have these monetary resources, the opposite scenario is more likely to prevail. In this regard, their freedoms to achieve are limited not by resources in their possession but by the lack of "effective freedom" (Sen 1992) to achieve what they desire in life or for the institution. Sen (1992) underscores this through the pronouncement that actual freedom is only obtained when one has the power to convert available resources into the fulfillment of desired ends. Therefore, in this case (of poor school communities) the pursuit of success "can and should be better seen in terms of capability failure than the failure to meet the basic needs of certain commodities" (Sen, 1992). In other words, if a school is constrained in the freedoms necessary to achieve certain expected and valued outcomes, the understanding of success should also be subjected to those realities.

CONCLUDING REMARKS

Applying the capability approach to the understanding of what success means endows the process with both philosophical and practical dimensions. Applying the capability approach can, firstly, philosophically authenticate success in Quintile 1 schools by dealing with the total reality of these school communities, and secondly, make a case for differentiation in terms of generalized assessments of success. The trap of viewing success of schools comparatively and according to simplified criteria of success and failure is an obvious error of logic. At all junctions of the assessment of success one needs to consider the so-called "conversion phase". Although not always a perfect fit, the capability approach nonetheless affords one the opportunities to practically engage with the real freedoms debate by emphasizing the nature of the capability sets at play in Quintile 1 schools, therefore focusing on more than just an outcome, for example, pass rates, but also focusing on who the participants the researchers are evaluating are, and also what their real freedoms are. In the acknowledgement that assessing the success of schools will remain a contested domain in education, pro-poor policies still demand that one appreciates the opportunities (philosophical and practical) presented by the capability approach to evaluate success in terms of capability conversion. As operationalization of the capability approach should rely on individual contexts and goals it would serve good to, in the words of Sen (1989), rather "be vaguely right than to be precisely wrong". There is therefore, a case to be made that one should view success within its contextual reality rather than the averaged out and limited view of a complex conversion process.

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