Researching Within the Educational Margins

Strategies for Communicating and Articulating Voices

Edited by
Deborah L. Mulligan
Patrick Alan Danaher

Palgrave Studies in Education Research Methods

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*In memory of Honorary Professor Glen David Postle AM
Empowering educator, faithful friend and inspiring leader for the
editors and for so many others.
For all those who learn, teach and research within the
educational margins.*

Series Editors' Foreword: Centring Research Within Educational Margins

"Educational margins" is a powerful metaphor that speaks to the centre's exceptions. Those whose knowledge and languages are left out of the very constitution of research are on the margins of educational centres. Linda Tuhiwai Smith (2006), through her efforts to centre Māori researchers within the dominant paradigms, disciplines and institutions of research, foregrounds the multi-layered, multi-dimensional dynamics of the educational margins. In *Researching Within the Educational Margins*, Deborah L. Mulligan and Patrick Alan Danaher bring together researchers who have deliberately chosen to work with and in the educational margins, among those struggling to reconstitute the tripartite phenomenon of research, education and margins. Collectively, these researchers extend the sense of educational margins, and deepen the sensibilities of reciprocity, relationality and respect necessary for working with and in the eductaional margins.

Over the past three decades of scholarly dialogues with Patrick Danaher, I have found a rare kindred spirit. In this book Patrick Danaher and Deborah Mulligan have brought together kindred souls to explore what the educational margins means for the researched, researchers and research. These researchers are bound together by their intellectual vocation of working *with* and *in* communities who occupy educational margins, many doing so because they themselves come from educational margins. Giving meaning to research as much as the educational margins

are datafied students (Jennifer Clutterbuck), occupational Travellers (Geoff Danaher and Patrick Danaher), later life learners (Brian Findsen), young autistic adults (Karen Glasby), and old men and their shed (Deborah L. Mulligan), and quiltmakers (Linda Claire Warner, Pirita Seitamaa-Hakkarainen and Kai Hakkarainen). Together these researchers have chosen the educational margins as sites for belonging to spatial, socio-economic, political and cultural struggles of resistance.

Conceptually, "educational margins" is explored in this book through reference to related terms that include: educational fringe dwellers/mainstream education policy practices (Christian Quvang); class border crossers/conventional schooling boundaries (Deborah Mulligan and Patrick Danaher; Mike Danaher); and the demarcation of insider/outsiders (Corey Bloomfield and Bobby Harreveld; Samantha Burns and Patrick Alan Danaher). In working through the metaphor of the "educational margins", the "hyphen" that separates First Nations Australians and those who have arrived since (Megan Forbes) recalls the post-colonial history of oppression and the possibilities of resistance. Cetrainly, *Researching Within the Educational Margins* provides me with new insights into exploring the tensions between the structural multilingual practices produced by government colonialisation and immigration policies on the one hand and the dominating monolingual drivers of research imposed by regulatory powers from above on the other hand.

Educational margins and fringe dwellers are related notions explored throughout *Researching Within the Educational Margins*, covering what is excluded or otherwise squeezed from the centre by all sides (Christian Quvang; Linda Claire Warner, Pirita Seitamaa-Hakkarainen and Kai Hakkarainen). The concept of "fringe dwellers" is used in Australia to signify the exclusion and alienation of First Nations Peoples through post-British colonisation (Jennifer Clutterbuck; Patrick Danaher and Deborah Mulligan; Bronwyn Wong). The founding of Australia as a nation-state through the federation of British colonies inaugurated an English-only, monolingual mindset that was constituted by a dictation test to produce an ethno-linguistically homogeneous nation-state, emptied of its multilingual First Nations Peoples and multilingual Asian immigrants (Seran, 2014). This book legitimises research methods that are developed, conducted, analysed, interpreted and assessed

for their use of fringe dwellers' marginalised repertories of knowledge-and-languages of divergent intellectual cultures.

Of the specific education research methods worked out through *Researching Within the Educational Margins* two are especially noteworthy. First, Megan Forbes centres the intellectual contributions of First Nations communities to decolonising research methodologies. Yarning is a methodology that has been re-created as a research method for working *with* and *in* Australia's First Nations communities, fringe dwelling communities marginalised by the post-British colonisation of the continent and its surrounding islands. Yarning is one of many conceptual contributions that First Nations peoples have made to research from their repertoires of knowledge-and-languages to facilitate the expression of educational marginalisation, and to re-present the educationally marginalised (Bessarab & Ng'andu, 2010; Hughes & Barlo, 2020). From a related perspective, Lu Siyi (陆思逸) and I have investigated the margins between the monolingual and multilingual constitution of critical thinking in research education (Singh & Lu, 2020).

A second multimodal research method initiated in *Researching Within the Educational Margins* employs creative, visual means for data collection and the dissemination of research findings. Linda Claire Warner, Pirita Seitamaa-Hakkarainen and Kai Hakkarainen open up possibilities for exploring how the collective work of quiltmaking can be used to enhance the creative conceptual work that stitches together empirical investigations into the fabric of informal learning. Their study raises questions about collective quiltmaking being employed as a multimodal research method by quilters for the creation of new knowledge and to explore ambiguous and contested concepts, including fringe dwellers, and creativity. Such methods can also be applied to the research practices of conceptualisation and research design (Ayrton, 2020).

Significant ethical issues are addressed throughout *Researching Within the Educational Margins* (Geoff Danaher and Patrick Alan Danaher; Michelle Jayman; Deborah L. Mulligan). For instance, Corey Bloomfield and Bobby Harreveld explore the ethics of researching fringe dwellers, specifcally those now labelled "Not in Employment, Education or Training." Situated on the fringe of employment and at the margins of education and training systems, these fringe dwellers are under constant

pressure from the centre to conform to its leanring and earning dictates, despite being imprisoned on the fringe, unable to cross to the other side of the many borders. For a long time, Professor Bobby Harreveld has been an awe-inspiring influence on the work of many who have struggled to centre research within the educational margins. I for one am especially grateful for Bobby Harreveld's scholarship and professionalism in shaping my quest for research methods that make it possible to see the world differently (Singh & Harreveld, 2014).

Ethically, many people are choosing the educational margins for creating intellectual cultures out of lives lived on the fringes, especially given the intense marketisation and commodification of education (Marlyn McInnerney). Bronwyn Wong reveals the ways that dominating market-driven perspectives distort education, marginalising teachers' efforts to equip students with the knowledge and capabilities for redressing power/knowledge/language relations that neoliberal policies continue to marginalise. The economic logic of educational margins remains even as the form and content of these margins shift—for instance with age (Deborah L. Mulligan; Brian Findsen), and are shifted—for example through job losses (Brian S. Hentz), the creation of flexible learning programmes for marginalised youth (Naomi Ryan) and post-school transition practices for young autistic adults (Karen Glasby).

Together these 20 chapters, reflecting diverse studies from Aotearoa New Zealand (Linda Claire Warner, Pirita Seitamaa-Hakkarainen and Kai Hakkarainen), throughout Australia (Naomi Ryan; Marlyn McInnerney; Deborah Mulligan) via China (Mike Danaher) to Denmark (Christian Quvang), demonstrate the rich and meaningful education in which those on the margins find their interests. These "educational margins" are occupied by people whose lives matter, including people who are trying to escape the margins but also those wo are investing in education and research there. These researchers have chosen to research with and for educationally marginalised communities in Oman (Samantha Burns and Patrick Danaher), the United Kingdom (Michelle Jayman) and the United States (Brian S. Hentz), and they themselves are often on the margins with their own institutions, disciplines and research communities. Certainly Deborah Mulligan and Patrick Danaher have brought together fellow researchers committed to creating better material

conditions for those on the educational margins. Together their efforts to develop new methods for centring research within the educational margins provide an inspiration to the many within those margins.

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Acknowledgements

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Mike Danaher is Senior Lecturer in History and Geography, and Head of the Bachelor of Arts programme, in the School of Education and the Arts at the Rockhampton campus of Central Queensland University, Australia. His research interests include environmental education, history and politics, particularly in Australia and Japan. He is the sole author of the research book *Environmental Politics in Japan: The Case of Wildlife Preservation*, the co-author of *Researching Education with Marginalized Communities* and the co-editor of *Strategic Uncertainties: Ethics, Politics and Risk in Contemporary Educational Research*.

Patrick Alan Danaher is Professor (Educational Research) and Deputy Head of School in the School of Education at the Toowoomba campus of the University of Southern Queensland, Australia. He is also an adjunct professor in the School of Education and the Arts at Central Queensland University and in the Division of Tropical Environments and Societies at James Cook University, both in Australia, and Docent in Social Justice and Education at the University of Helsinki, Finland. His research interests include educating occupationally mobile communities; education research ethics, methods, politics and theories; and researchers' work and identities. He is also a series editor of *Palgrave Studies in Education Research Methods*.

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Megan Forbes is a Doctor of Philosophy candidate in the Faculty of Business, Education, Law and Arts at the Toowoomba campus of the University of Southern Queensland, Australia. She is a psychology graduate whose research interests include Aboriginal and Torres Strait Islander social and emotional wellbeing, and the use of yarning as a research method. Her doctoral research explores the influence of engagement with the memorialisation of post-contact heritage on the social and emotional wellbeing of regional and remote Aboriginal communities in South West Queensland, Australia.

Karen Glasby is a lecturer and Doctor of Education candidate in the School of Education at the Toowoomba campus of the University of Southern Queensland, Australia, and also the mother of a young autistic adult. She worked for several years as a special education teacher with a primary focus on supporting students with autism spectrum disorder. She is a strong advocate for education's role in enhancing all young people's outcomes. Her doctoral thesis is entitled "Self-determination for the Rest of My Life: Young Autistic Adults' Insights into the Interaction Between Queensland Secondary School Transition Practices and Post-School Quality of Life".

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Bobby Harreveld is Professor of Education in the School of Education and the Arts at the Rockhampton campus of Central Queensland University, Australia. She researches in education and employment transition pathways; capability development for access; participation in learning and earning; the scholarship of teaching and learning; distance, open and online teaching and learning; and sociocultural understandings of education in diverse contexts. She was awarded life membership of the Vocational Education and Training Network (Australia) for services to vocational education and workplace transitions nationally and internationally. She is also a series editor of *Palgrave Studies in Education Research Methods*.

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Michelle Jayman is a lecturer and researcher in the School of Human and Social Sciences at the University of West London, United Kingdom. She is a Convenor for the British Educational Research Association's Mental Health, Wellbeing and Education Special Interest Group, and a Champion for the British Psychological Society Education Section. Her research interests include mental health, resilience and programmes to improve learner outcomes. Her current projects include evaluating "Book of beasties", a mental wellness card game in primary schools, and co-editing a book about interventions and initiatives to support children's mental health in a digital age.

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Deborah L. Mulligan researches in the field of gerontology, specifically in the area of older men (men aged over 50) and suicide ideation. She has a strong interest in community capacity building through examining the effectiveness and sustainability of particular men's groups with male-only membership.

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Bronwyn Wong has extensive teaching experience in secondary schools, both in Australia and in Germany, and she is the Deputy Principal at an Independent Christian school in Western Sydney, Australia. She has recently completed completed her Doctorate of Philosophy in the Faculty of Business, Education, Law and Arts at the Toowoomba campus of the University of Southern Queensland, Australia. Her thesis was entitled "Not for Sale: The Challenge to Imbue a Kingdom-Shaping Christian School Education for Shalom in an Australian Market-Driven Context". She has written articles and presented at several conferences about this topic.

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Part I

Contextualising and Conceptualising Research Within the Educational Margins: Introduction

Deborah L. Mulligan

What is the nature of ethical research? How do researchers frame their projects when investigating with those who do not slot conveniently into mainstream education? The two chapters in the first section of this book orient the reader to the processes of contextualising and conceptualising research within the educational margins. This section focuses on the "otherness" of those in our society who are essentially, through no fault of their own, educational fringe dwellers and border crossers.

Chapter 1, written by Patrick Alan Danaher and Deborah L. Mulligan, delves beneath the surface of academic marginalisation. It locates researching within educational margins firmly within the bounds of current scholarly literature. It then presents a selection of strategies that highlight best practice when communicating and articulating the individual voices of the research participants. Finally, the chapter provides an overview of the book, citing the key questions around which the book is structured.

Chapter 2, written by Deborah L. Mulligan and Patrick Alan Danaher, discusses the heart of researching within the educational margins—the concept of wicked problems. Wicked problems constitute complex situations that evolve as the research deepens and intensifies, and as new solutions are presented, considered and implemented or discarded. Such is the nature of research that defies a linear representation with a neat, comprehensible solution.

1

Setting the Scene for Researching Within the Educational Margins: Selecting Strategies for Communicating and Articulating Voices in Education Research Projects

Patrick Alan Danaher and Deborah L. Mulligan

Abstract Globally, there are multiple individuals and groups whose learning is enacted within the educational margins, and whose status is consequently that of educational fringe dwellers and sometimes border crossers. This status in turn positions them as exhibiting varied forms of otherness in relation to mainstream educational policy-making and provision, and generates both challenges and opportunities for their learning success.

Education researchers working with these individuals and groups also face challenges and opportunities in deploying research methods that are genuinely reciprocal, relational and respectful. Drawing on contemporary theorising about educational marginalisation, this chapter elaborates

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selected elements of setting the scene for researching effectively within the educational margins, as well as selecting specific strategies for communicating and articulating voices in education research projects.

Keywords Educational border crossers • Educational fringe dwellers • Educational margins • Other/ness • Voice/s

Introduction

Learners conduct their activities in highly varied contexts and environments. In some cases, they are afforded opportunities to engage with highly skilled educators and with high quality resources that generate enriching educational experiences and that maximise their success. In other situations, by contrast and for a variety of reasons, learners encounter challenges that derive from their distinctive circumstances rather than from their learning capabilities, and sometimes those challenges prevent their success, despite their best efforts and often those of their teachers.

From this latter perspective, this book is focused on the phenomenon of *researching within the educational margins*. As we elaborate below, there are multiple potential approaches to conceptualising and constructing such margins, and to tracing their manifestations and effects. At the same time, these approaches have in common an attentiveness to the educational aspirations, experiences and outcomes of individuals and groups whose lives are variously different in particular ways from the sociocultural norms of the community majority, and/or who are subject to specific forms of marginalisation in comparison with mainstream community members. In some instances, these people are *educational fringe dwellers*, positioned as being "other" in relation to citizens with regular access to capital, power and status. This state of otherness or alterity may generate educational bias, and might impact on these fringe dwellers in multiple manifestations. In other cases, these people are *educational border crossers*, who mobilise opportunities to contest the ideological bases of their marginalisation and positioning, and who thereby engage in practices that can potentially enable and transform their situations, including through formal and informal learning.

The subsequent chapters in the book are concerned with the approaches taken by education researchers who work with these individuals and groups who are learning within these educational margins. In particular, the book investigates the diverse and specific *education research methods and strategies* that these researchers have developed and applied in order to ensure that their research is authentic, rigorous, situated and where possible empowering. These methods and strategies are located against the backdrop of increasing scrutiny of the conduct of researchers working with marginalised people, including in relation to the sets of protocols associated with gaining formal ethics approval and informed consent by participants in order for such research projects to take place. In view of this scrutiny, it is timely to examine and evaluate the effects and the effectiveness of the research methods and strategies deployed by education researchers who are working with variously marginalised individuals and groups.

A crucial element of researching within these educational margins is the capacity to communicate and articulate voices. These voices are recognised as being diverse and sometimes contradictory, reflecting as they do divergent worldviews and sometimes competing interests. In varied ways, the subsequent chapters highlight some of the complexities entailed in communicating and articulating voices in specific research projects, as well as strategies of proven effectiveness in achieving that communication and articulation.

This chapter consists of the following three sections:

1. Setting the scene for researching within the educational margins (situating such research in contemporary scholarly literature)
2. Selecting strategies for communicating and articulating voices in education research projects
3. Structuring the book and sequencing the chapters.

Setting the Scene for Researching Within the Educational Margins

Contemporary scholarly literature reflects increased interest in researching within the educational margins. Appropriately, such literature evinces considerable diversity in terms of paradigms, research questions and methods, findings and recommendations for action. Likewise, the subsequent chapters in this book demonstrate an equivalent diversity of focus and approach, while having in common an interest in understanding the circumstances of learners who inhabit the educational margins.

More broadly, yet equally appropriately, there is a considerable diversity evident in definitions and conceptualisations of marginalisation. One such definition was provided by Schiffer and Schatz (2008): "Marginalisation describes the position of individuals, groups or populations outside of 'mainstream society', living at the margins of those in the centre of power, of cultural dominance and economical and social welfare" (p. 6). A variation on this theme was afforded from a nursing perspective: "Marginalization is defined here as a process by which persons or groups are socio-politically peripheralized from dominant, central experiences, that is deprived of mobility, control over self will, and/or critical resources, indignified [*sic*] and humiliated" (Hall & Carlson, 2016). The feminist theorist bell hooks (2000) defined marginalisation even more succinctly: "To be in the margins is to be part of the whole but outside the main body".

At the same time, there is a recognition of the potential risks associated with these kinds of definitions. One such risk is that of homogenising, and accordingly of eliding the differences among, individuals and groups who exhibit possibly marginalising characteristics, prompting Williams and Horodnic (2015) to endorse "a more nuanced understanding" and a "more variegated assessment" (p. 153) of marginalisation. This "more nuanced" and "more variegated" approach was exemplified by Scharr's (2014) study of young people participating in social enterprises, whose "core foundational definition of the young people's lack of participation in education and employment" (p. 12) was augmented by acknowledging that they "dealt with multifaceted issues such as offending history, lack of

social support, limited work experience and early school leaving" (pp. 12–13), thereby "demonstrat[ing] the complex nature of their marginalisation" (p. 13).

A different potential risk relates to researchers needing "to ensure that they do not deploy the discourse of 'marginalization' in ways that actually help to replicate the inequities that they are seeking to make explicit and to contest" (Danaher, Cook, Danaher, Coombes, & Danaher, 2013, p. 4). This risk was illustrated neatly by the crucial point by Winkle-Wagner, Hinderliter Ortloff and Hunter (2009) that definitions of marginalisation differ markedly accordingly to whose perspectives those definitions reflect. For example:

> … to provide a working definition of the margins by the boundaries of dominant culture is to define those in the margins as *not* something. Marginality becomes defined as the non-normal, the non-mainstream, the non-center; invoking a deficit model upon those people, ideas, and so on that are marginalized while reaffirming the normalcy of the center. (p. 3; *emphasis in original*)

At the same time, it is often difficult for people who are marginalised to define their situations without invoking—or at least acknowledging—the same "deficit model": "Marginality inherently references the mainstream" (p. 3).

Against the backdrop of these varied definitions and potential contradictions, constructions of marginalisation are being applied to an increasing array of scholarly endeavours and policy concerns. These applications range from the intersection between mental illness and poverty (Helsel, 2015) and the negative effects on individuals employed in informal, nonformal and non-industrial work (Jammulamadaka, 2019) to the economic and social status of African-American males in the United States (Weatherspoon, 2014) and encounters with racism by academics of colour working in British universities (Sian, 2019) to initiatives in civic and political participation by Muslim citizens in Australia and Germany (Peucker, 2016) and the experiences of silencing and suffering by particular excluded groups (Herzog, 2020). This diversity of applications

parallels an equivalent variability in conceptions of marginalisation and in prescriptions for its amelioration.

More specifically, the scholarly literature reflects multiple understandings of the character of educational marginalisation. For instance, Messiou (2006) observed helpfully that children in the same challenging situations vary about whether they experience those situations as personally marginalising, and consequently emphasised the importance of including children's research when researching about inclusive education (Messiou, 2012). Mowat (2015) emphasised "the importance of [analysing] the wider societal and political context" in which children experience marginalisation through schooling, and proposed "the concept of resilience as a lens through which marginalisation can be understood" (p. 454), thereby highlighting the multiple contextual layers and levels in which marginalisation is manifested, as well as the ways in which it saps children's resilience. From a different perspective—or, paradoxically, perhaps relatedly—Minton (2016) interpreted school-based bullying as a form of marginalisation that reflects broader psychological and sociocultural forces. Ferfolja (2018) drew on these broader forces to assert powerfully that "Marginalisation … [is] the process of pushing an individual or group of individuals to the edges/fringes of society. In the case of educational marginalisation, this refers to systemic, institutional maltreatment, which includes curricular and pedagogical neglect" (p. 65).

These various accounts of educational marginalisation accentuate another potential paradox related to formal—and perhaps non-formal and informal—education. This paradox is that such education can, and often does, function as an agent of marginalisation, by contributing to perpetuating and reproducing existing socioeconomic inequities. On the other hand, such education can function also as a means of empowerment and of challenging and possibly transforming those inequities. Or as Lanskey (2015) synthesised this paradox succinctly in terms of:

the interplay between exclusionary and inclusionary interests operating within and between the agencies of education and youth justice and the extent to which they play a role in sustaining young people's involvement in education or compounding their educational and social marginalisation. (p. 568)

In setting the scene for researching within the educational margins, this section of the chapter has situated such research in contemporary scholarly literature. In doing so, we have sought to highlight the diversity of definitions and conceptualisations of marginalisation, and hence of educational marginalisation, as well as the contested policy and practice terrains in which such definitions and conceptualisations are enacted. We have referred briefly to specific renditions of the character of educational marginalisation, and we have emphasised education's ambivalent status in reinforcing and/or in contesting such marginalisation. We turn now to the crucial task of selecting strategies for communicating and articulating voices in education research projects.

Selecting Strategies for Communicating and Articulating Voices in Education Research Projects

In this section of the chapter, we propose some possible strategies that might be effective in communicating and articulating voices in particular education research projects. These strategies are intended to resonate with the highly diverse conceptual and methodological resources that are deployed in the subsequent chapters in this volume. From this diversity, researching within the educational margins emerges as a theoretically sophisticated enterprise, with significant applications and implications for educational policy-making and practice alike.

Why more specifically is it important to communicate and articulate voices in education research projects when we are researching within the educational margins? Pragmatically, in any research project it is desirable to engage with the full range of experiences and perspectives of participants in the activity or enterprise under review, in order to maximise understanding of the associated concerns and issues. More significantly, given the accounts of marginalisation synthesised in the preceding section of this chapter, educational marginalisation generates differentiated levels and types of access to educational provision, which in turn signify competing and unequal speaking positions.

Such positions are often associated with feminist theory (Couldry, 1996; see also Lipton & Mackinlay, 2017). However, here we mobilise the term more broadly to denote the different accounts of the same, shared phenomenon communicated by different participants in that phenomenon, and also the different degrees to which those accounts are attended to, respected and valued. From this viewpoint, speaking positions on the educational margins are inherently politicised and unequal, thereby generating greater complexity for education researchers striving to communicate and articulate voices in research projects about those educational margins. This important point about the interplay between marginalised voices and social (in)justice was illustrated poignantly by this cry from the heart expressed in 2015 by a female activist and educator working in Myanmar: "Where is equality? Where is justice? Where is fairness? Where is the voice of the poor, marginalized, and uneducated people?" (as cited by Maber, 2016, p. 416).

Fortunately, a growing body of literature is able to assist researchers working in the educational margins to navigate this complexity in relation to communicating and articulating voices. For instance, it is incumbent on such researchers to explicate "how to understand the agency of people who are marginalised", and also "to explore how the most marginalised individuals reclaim or reconfigure subjecthood in ambiguous terms" (Strange, Squire, & Lundberg, 2017, p. 243). A vital means of understanding agency is to analyse the intersection between such agency and the development and exposition of voice, while the generation of increasingly capable and confident speaking positions can be posited as an effective strategy for reclaiming and reconfiguring subjecthood.

From a different perspective, harnessing voices in education research can entail the reversal of generally enacted roles and the associated sharing of knowledge that otherwise remains tacit and unexamined. For example, Morris (2019) explored what happened when a group of secondary school students provided professional development for their teachers about using information and communication technologies in their classrooms in England. Morris interpreted the outcomes of this student voice initiative in terms of transformational learning for both groups of participants and the improvement of teacher–student relationships.

Likewise, a recent investigation of approaches to engaging student voices in higher education in the United Kingdom (Lygo-Baker, Kinchin, & Winstone, 2019) employed varied research methods to record and analyse such voices. Simultaneously, the editors warned against notions of the student voice as a monolithic entity that elide the heterogeneity of distinctive perspectives, including those held by single participants. The editors and authors advocated also developing ways of working in partnership with research participants—in this case, university students—as a welcome corollary of engaging their voices.

A different corollary of communicating and articulating the voices of marginalised learners is what Khoja-Moolji (2016) conceptualised as "the 'work of hearing'" (p. 745). Khoja-Moolji elaborated the specific elements of this politically charged process as follows:

> Focusing on an engagement with girls in Pakistan, the author theorises that the practice of hearing entails attending to the seepages and excesses of girls' voices—or, that which exceeds dominant codes—that point to the multiplicity of their investments, commitments and visions of [a] good life; being open to new terms of development that are identified by the participants themselves, terms that may not align with prevalent "best practices"; and being cognisant of the weight that Eurocentric knowledges carry, which often makes the work of hearing indigenous knowledges difficult. (p. 745)

In other words, communicating and articulating voices in education research projects within the margins can often carry the researchers into previously uncharted waters, requiring them to develop new and potentially innovative techniques for authentically and genuinely hearing those voices.

Drawing on his expertise in intercultural education research, Dervin (2014) devised helpfully a set of questions for researchers to consider when engaged in such research—questions that apply equally to researching within the educational margins:

> Who is really talking and making a statement? [F]rom what position-s is an individual speaking? On whose behalf? Whose voice cannot be heard? In

what language(s) are people "doing" voice and what impacts does it have on what they say and their interlocutors? (p. viii)

Crucially, Dervin (2014) insisted that education researchers need to subject their own voices to critical scrutiny in analysing, talking and writing about the voices of the participants in their research projects:

How much are the voices that we analyse influenced by our presence, the context of interaction, the intertextuality we share with our participants? Researchers' voices need to be taken into account: their inner voices through reflexive accounts but also the voices through which they construct discourses with their research participants. (p. viii)

Relatedly, Midgley, Davies, Oliver and Danaher (2014) expressed a countervailing concern that, while the increasing focus on attending to research participants' voices is laudable, there might be circumstances in which "the voice for researchers' rights is virtually drowned out" (p. 9). Moreover, the influence of context is vital with regard to researcher–research participant relationships and voices: "What might, in one instance, be emancipatory could, in another instance, be burdensome" (p. 9).

This section of the chapter has considered diverse approaches to selecting strategies for communicating and articulating voices in education research projects. We have placed that selection against the backdrop of the affordances and responsibilities of researching within the educational margins highlighted in the preceding section. This placement in turn positions the communication and articulation of voices in such projects as politicised and situated. As we seek to demonstrate in the next section, in relation to the following chapters in the book, these characteristics behove education researchers to design, conduct and evaluate their projects cautiously and judiciously, yet additionally with a sense of hope and optimism that those projects can also generate productive and even transformative outcomes.

Structuring the Book and Sequencing the Chapters

As one means of enhancing the coherence of this book, chapter authors were asked to engage directly with one or more of the following organising questions:

1. How can education researchers help to analyse and explain *why and how* some individuals and groups come to be learning within the educational margins, and what the *effects* of learning within the educational margins for those individuals and groups are?
2. How can education researchers develop and apply *effective strategies for researching* with individuals and groups who are learning within the educational margins?
3. How can education researchers maximise the *innovativeness, reciprocity and utility of their research methods* for the marginalised participants in their research?
4. How can education researchers contribute to *educational fringe dwellers communicating their experiences and articulating their voices*?
5. How can education researchers assist the marginalised participants in their research to *become successful educational border crossers*?

The chapters in the book are divided into the following five parts:

- Part I: Contextualising and conceptualising researching within the educational margins.
- Part II: Researching with children and marginalised youth.
- Part III: Researching about cultural differences and intercultural experiences.
- Part IV: Researching about informal learning and with older learners.
- Part V: Applications and implications of researching within the educational margins.

Part I: Contextualising and Conceptualising Researching Within the Educational Margins

As is outlined in Fig. 1.1, in helping to contextualise and conceptualise the broader terrains in which the subsequent chapters in the book are located, Chap. 1, written by Patrick Alan Danaher and Deborah L. Mulligan, situates the book in selected literature about marginalisation and researching and learning within the educational margins. Relatedly, Chap. 2, written by Deborah L. Mulligan and Patrick Alan Danaher, elaborates the notion of wicked problems as exemplifying one among several ways to inform research within the educational margins, and to animate strategies for communicating and articulating voices in such research.

Part II: Researching with Children and Marginalised Youth

As is presented in Fig. 1.2, Part II contains six chapters about researching with children and marginalised youth. Michelle Jayman uses Chap. 3 to link harnessing the "unique voice" of the child with enhanced programme evaluation and development in education research in the United Kingdom. In Chap. 4, Corey Bloomfield and Bobby Harreveld interrogate the ethics of insider research when investigating an alternative learning programme in Central Queensland, Australia. Naomi Ryan examines in Chap. 5 ethnographic research in exploring career development in a flexible learning programme in South West Queensland, Australia.
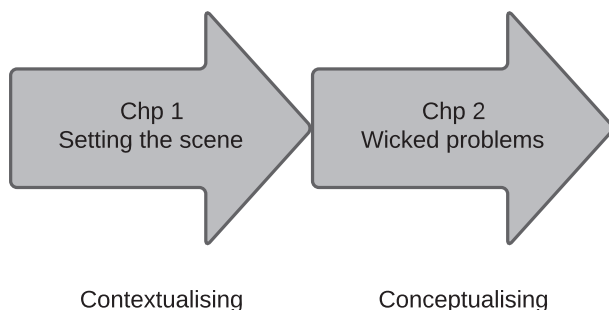
Fig. 1.1 Flowchart for Part I
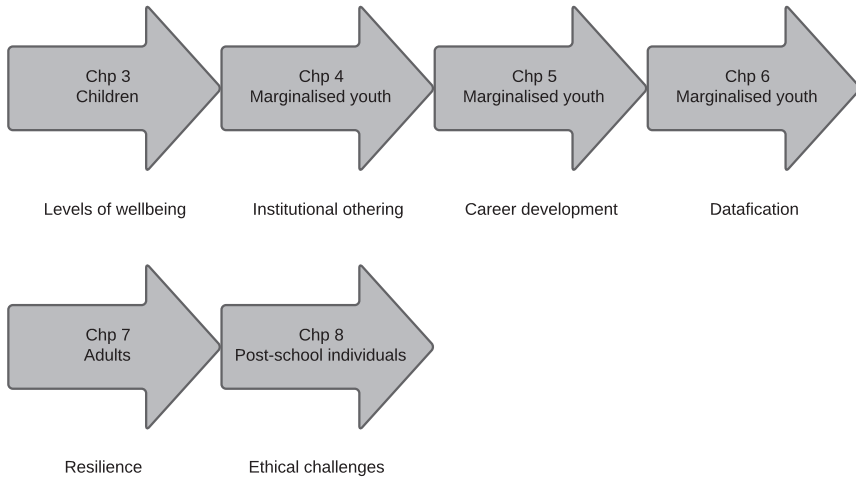
Fig. 1.2   Flowchart for Part II

Chapter 6 is deployed by Jennifer Clutterbuck to map the inequity arising from the datafication of educational data infrastructures in Queensland, Australia. Christian Quvang advocates in Chap. 7 the benefits of using narrative research to articulate the voices of students who are referred to special educational needs units in Denmark. Finally in Part II, Chap. 8 is employed by Karen Glasby to elaborate her innovative approach to ethics in researching with autistic young people in South West Queensland, Australia.

Part III: Researching About Cultural Differences and Intercultural Experiences

As Fig. 1.3 represents, Part III includes five chapters about researching about cultural differences and intercultural experiences. Bronwyn Wong uses Chap. 9 to review her use of action research in an independent Christian school in New South Wales, Australia. In Chap. 10, Megan Forbes explores yarning as a culturally appropriate method in researching with Indigenous Australians in South West Queensland, Australia. Mike Danaher employs critical interculturality in Chap. 11 to reflect on an Australian university study tour to China. Samantha Burns and Patrick
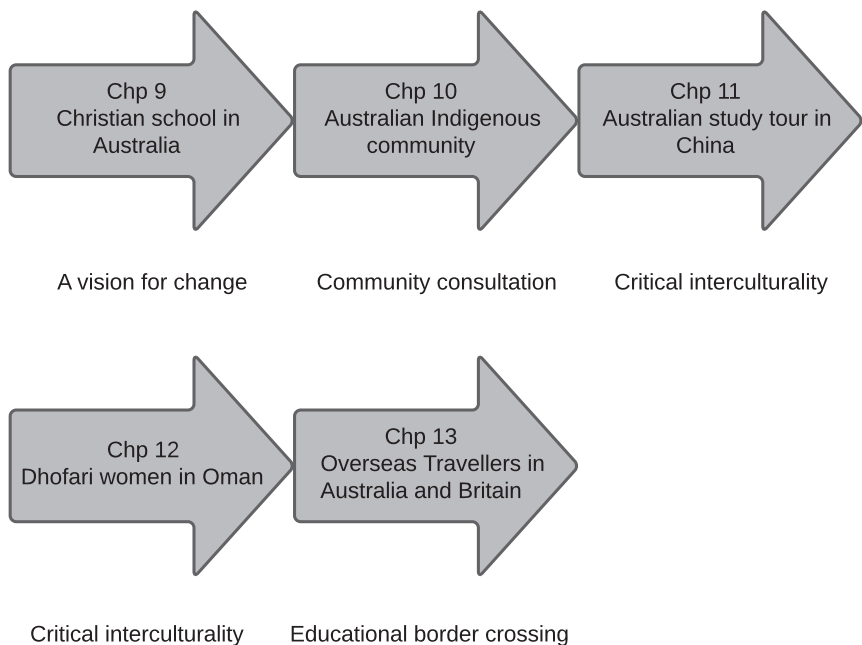
Fig. 1.3   Flowchart for Part III

Alan Danaher mobilise in Chap. 12 the notion of critical interculturality to analyse Dhofari women's experiences of English language undergraduate courses in Oman. Finally in Part III, in Chap. 13, Geoff Danaher and Patrick Alan Danaher interrogate their colleagues' and their research with Australian and British fairground people through the lens of educational border crossing.

Part IV: Researching About Informal Learning and with Older Learners

As Fig. 1.4 illustrates, Part IV presents five chapters about researching about informal learning and with older learners. Linda Claire Warner, Pirita Seitamaa-Hakkarainen and Kai Hakkarainen explore in Chap. 14 ethnography as a method for researching collective quiltmaking in Aotearoa New Zealand. In Chap. 15, Marlyn McInnerney examines her

Chp 14
Quiltmaking

Chp 15
Insider research

Chp 16
Learning in later life

Communal activity

Ethical dilemmas when conducting insider research

Research efficacy

Chp 17
Older men

Chp 18
Older men

Retirement

Involuntary job loss
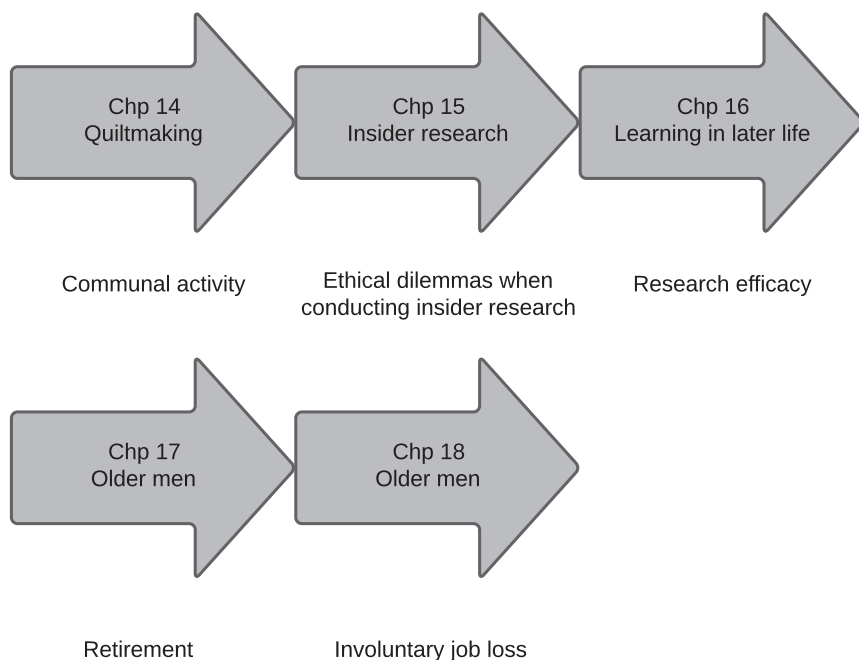
Fig. 1.4   Flowchart for Part IV

role as an insider researcher with female members of agricultural families in remote Queensland, Australia. Brian Findsen conducts in Chap. 16 a critical review of research about learning in later life. In Chap. 17, Deborah L. Mulligan highlights the ethical dimension of her multi-site case study research with older men in South West and South East Queensland, Australia. Finally in Part IV, Brian Hentz uses Chap. 18 to elaborate a phenomenological analysis of older, professional men coping with involuntary job loss in the United States.

Part V: Applications and Implications of Researching Within the Educational Margins

As Fig. 1.5 signifies, Part V presents two chapters about the applications and implications of researching within the educational margins. Chapter 19, written by Deborah L. Mulligan, sounds a clarion call for researchers working within the educational margins to embrace activism as a means of understanding, and contributing to, real-world reciprocity. Finally in this section and in the book, Chap. 20 by Deborah L. Mulligan and Patrick Alan Danaher distils selected answers to the organising questions framing the book as a way of synthesising the preceding chapters, as well as of encapsulating the significance of the book's demonstrated effective
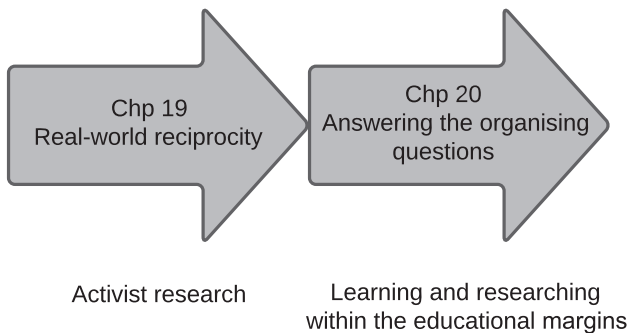
Fig. 1.5   Flowchart for Part V

and ethical research methods as specific strategies for communicating and articulating voices within the educational margins.

Finally in introducing the book, the chapters' academic rigour has been enhanced through a systematic, two-step editorial review process. Firstly, each chapter abstract was read and reviewed independently by each editor, with feedback being provided to chapter authors as required. Secondly, the same process was applied to the full text of each chapter, with chapter authors engaging with the editors' feedback as appropriate.

Conclusion

This chapter has been directed at setting the scene for the subsequent chapters' highly diverse accounts of researching within the educational margins. The chapter has also presented some ideas and principles for the vital activity of selecting strategies for communicating and articulating voices in the associated education research projects.

In doing so, the chapter has highlighted some of the ways in which this book is designed to contribute new understandings of contemporary education research methods. The considerable range of such methods traversed in the following chapters includes action research, autoethnography, case study, critical reviewing, ethnography, insider research, narrative research, phenomenography, phenomenology, trans-philosophical/trans-national/trans-cultural research and yarning, and elaborating also the methodological implications of the concepts of activism, children's voices, critical interculturality, datafication, educational border crossing, emancipatory learning, ethics, representation and wicked problems.

More widely, we see this admixture of researching within the educational margins, communicating and articulating the voices associated with those margins and interrogating specific research methods for their ethicality and utility in contributing to that research as constituting a significant milestone in the continuing project of empowering research participants and of transforming understandings of education and marginalisation.

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2

The Wicked Problems of Researching Within the Educational Margins: Some Possibilities and Problems

Deborah L. Mulligan and Patrick Alan Danaher

Abstract Strategies for conceptualising researching within the educational margins abound. One such strategy is to mobilise the notion of wicked problems, which help to understand manifestations of educational marginalisation as multicausal and multifaceted, and as defying simplified problem-solving and "one size fits all" approaches, focusing instead on the contextualised specificities attending the phenomenon, and on analysing the multiple and sometimes competing interactions among, and interests of, the stakeholders.

This chapter portrays selected possibilities and problems related to conceptualising educational marginalisation as wicked problems. A selective account of the defining features of wicked problems is followed by examples of this concept being deployed to investigate such marginalisation, while acknowledging the constraints associated with this deployment.

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Introduction

The first chapter in this part of this book elaborated selected elements of setting the scene for researching effectively within the educational margins, in the process proposing particular strategies for communicating and articulating voices seeking to be heard along those margins. The intention was to contextualise the chapters to follow in the remainder of the book.

This chapter is designed to contribute to the complex process of conceptualising diverse approaches to researching within the educational margins. As we elaborate below, the notion of wicked problems (Australian Public Service Commission, 2007; Rittel & Webber, 1973) emerges as a powerful and productive approach to such research, including with those whose learning experiences and opportunities are portrayed in the subsequent chapters. This is because, like manifestations of educational marginalisation, wicked problems are multicausal and multifaceted, and they elude straightforward prescription or easy resolution. At the same time, engaging comprehensively with the analysis of wicked problems generates important insights and provides the foundation for situated strategies that might facilitate carefully targeted efforts to address particular elements of the wicked problems—and by extension of the examples of educational marginalisation canvassed in the succeeding chapters.

The chapter is divided into the following two sections:

- A selective account of the concept of wicked problems
- Examples of the applicability of wicked problems to researching within the educational margins.

The Concept of Wicked Problems

The concept of wicked problems was first theorised by Rittel in the mid-1960s, and the notion was later conceptualised more fully by Rittel and Webber (1973) in their seminal paper entitled "Dilemmas in a General Theory of Planning". Rather than any evil intent therein, "wickedness" refers to the ethical concerns and complexity of a problem. The antonym in this context is a "tame" problem—that is, one that can be solved in a linear fashion with predictable and structured research approaches. By contrast, wicked problems evolve as the research deepens and intensifies and as new solutions are presented, considered and implemented or discarded.

More specifically, the defining features of wicked problems have been listed as follows:

- Wicked problems are difficult to clearly define.
- Wicked problems have many interdependencies and are often multicausal.
- Attempts to address wicked problems often lead to unforeseen circumstances.
- Wicked problems are often not stable.
- Wicked problems usually have no clear solution.
- Wicked problems are socially complex.
- Wicked problems hardly ever sit conveniently within the responsibility of any one organisation.
- Wicked problems involve changing behaviour. (Australian Public Service Commission, 2007, pp. 3–4)

The contrast between tame and wicked problems is represented visually in Figs. 2.1 and 2.2.

As is noted above, wicked problems are difficult to define as there are often multiple stakeholders across different disciplines involved in the situation, generally voicing opinions derived from divergent and sometimes competing interests. The interconnectedness of the problem often leads to a re-evaluation of the societal norms involved. This results in

Tame problems are intuitive, well-defined and linear in nature. They follow a set trajectory.

Identify the problem

Gather the data

Analyse the data

Formulate a solution

Solve the problem
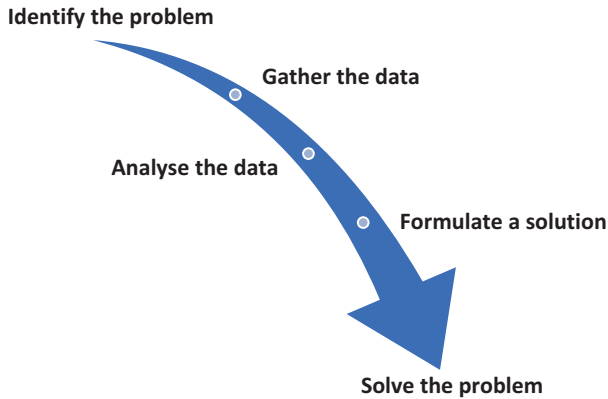
Fig. 2.1   A visual representation of tame problems

social rather than technical complexity, and the difficulty of coordination among stakeholders is thought to be an overwhelming factor in problem-solving approaches (Australian Public Service Commission, 2007). Owing to the uniqueness of each wicked problem, precedents are difficult to find and to follow. The unstable character of these problems ensures that the foci change frequently as the processes evolve.

Simple, clear solutions to wicked problems are elusive because of this instability of the problem. No one answer is right or wrong; rather the emphasis is on the degree of pertinence—that is, whether one solution is better or worse than another. Each identified solution is a one-shot attempt and has validity if only to exclude that particular approach. The no stopping rule ensures that different solutions are continually sought, and diverse theories are tested. Morrison (2013) posited that acceptance of the "inherent wickedness" of a problem and of the consequences that lie therein may provide an initial step towards resolving the problem. Similarly:

> Our diverse interests and perspectives become a curse when each stakeholder believes it holds "the truth" and expects everyone to share it, or worse, when a stakeholder wants to impose his [or her] view of truth on

Wicked problems are nonlinear and problematic, and they do not follow a set trajectory.

| Every problem is unique. | Every problem is connected to other problems. | There is no single solution. | Problems are never completely 'solved'. |

| They defy simplistic solutions. | There are multiple stakeholders. | Every attempt at a solution is a valid, 'one-shot' process. | There is a no stopping rule. |

| Solutions are better or worse. | There is no right or wrong solution. | There are no alternative solutions. | Problems can be understood in numerous ways. |

Fig. 2.2 A visual representation of wicked problems

| They are unstable. | They require behavioural changes by stakeholders. | They are cross-disciplinary. | They involve complicated social norms. |
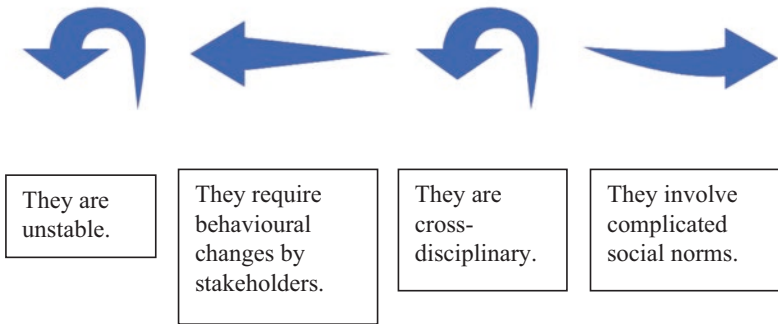
Fig. 2.2 (continued)

others and considers anyone who refuses to accept it as dumb, ignorant, or morally deficient. (Roberts, 2000, p. 13)

The solutions to many wicked problems include shifting the behaviour of individuals or groups, some of whom are historically intractable in their opinions.

This is a complicated process, and researchers may find themselves frustrated at the lack of simple answers. Conklin (2011) presented a series of five common tactics that a researcher may consider either voluntarily or involuntarily in order to alter the trajectory of a study that is delving too far into a wicked dimension. The researcher may "Redefine the problem as tame"; "Refocus on a smaller, related problem"; "Narrow the allowed solution options"; "Exclude difficult stakeholders"; and/or "Outsource the problem-solving process". These elements are simplified as follows:

- Redefine the problem
- Refocus on a smaller problem
- Reframe the solution options
- Reject difficult stakeholders
- Redirect the problem-solving process.

Sherman (2016) referred to this process of repudiation of accountability as "fortress leadership mentality" (p. 380). This applies when project managers or researchers reject a complex wicked problem in favour of a more simplified, expedient outcome or solution. Sherman further theorised that, in order to convert wicked problems into "wicked opportunities", one must be prepared to "dance with complexity" (p. 380) and to address the problem in a holistic manner that requires a multidisciplinary approach. Unintended consequences should be embraced for the opportunities that they provide. When a researcher shifts the "burden" (Conklin, 2011, n. p.) of the problem, he or she reduces its nature, and so it becomes less significant and less related to the original. In this regard, Conklin (2011) cited Rittel's (1973) opinion that taming a wicked problem is unethical.

It should be noted that not all complicated problems can be classified as wicked. To identify a wicked problem, the researcher must consider multiple theoretical possibilities, and the extent of the investigative field. Wicked problems challenge traditional skill sets and knowledge structures. They require "bigger picture", multidisciplinary thinking that involves innovations and tenacity. They may also require collaborative networks that draw on "collective intelligence" (Jha & Lexa, 2014, p. 437). Similarly, Roberts (2000) suggested that the establishment of a "community of interest" (p. 14) would ensure ongoing dialogue among all stakeholders.

A somewhat divergent characterisation of wicked problems that nevertheless confirms the broad tenor of the preceding discussion was presented by Adam (2016):

The type of wicked problems I hope to identify in this book could be known more specifically as *entangled problems*, which arise at the interface of interdependent polarities. They are "wicked" in the sense that this

interface is contextually dynamic and problems must be (re)solved in context rather than solved once and for all. Such problems are perplexing; they involve paradox, dialectic and necessary tensions. (*italics in original*)

Significantly, Levin, Cashore, Bernstein and Auld (2012) articulated the concept of super wicked problems that added four new dimensions: "time is running out; those who cause the problem also seek to provide a solution; the central authority needed to address it is weak or non-existent; and, partly as a result, responses discount the future irrationally" (p. 123). The authors contended that, in concert, these dimensions constitute "a policy-making 'tragedy' where traditional analytical techniques are ill equipped to identify solutions" (p. 123). In response, they advocated equally complex strategies to ameliorate this "tragedy": "understanding how to trigger *sticky* interventions that, through progressive incremental trajectories, *entrench* support over time while *expanding* the populations they cover" (p. 123; *italics in original*).

A variation on this characterisation of super wicked problems, albeit from the field of architecture (thereby accentuating the status of wicked problems and super wicked problems as concepts with very wide disciplinary coverage), was presented by Frimpong and Dansoh (2018). These researchers analysed such problems in terms of "six key features" (p. 292):

First, the problem has a difficult definition. Second, the solution involves a large structural and economic burden. Third, time is of the essence. Fourth, multiple stakeholders attempting to solve the problem are part of the cause. Fifth, institutional interventions addressing the issue are weak or ill-equipped. Sixth, institutional interventions discount the future irrationally. (p. 292)

At this juncture, it is appropriate to acknowledge contemporary critiques of the notion and applications of wicked problems. For instance, Alford and Head (2017) contended that analyses of wicked problems "tend to 'totalise', regarding them as intractable masses of complexity, so conflict-prone and/or intractable that they defy definition and solution" (p. 397). Furthermore, "A second shortcoming, linked to intractability, is

that the favoured means of tackling wicked problems has tended towards 'one best way' approach, most commonly collaboration with key stakeholders" (p. 397). Moreover, "we argue for a more realistic standard of success in dealing with wicked problems, especially the most difficult ones" (p. 397). More broadly:

> To call for the "solving" of these [wicked] problems is to set up a standard which is not only impossible but also perhaps unnecessary. We argue that we do not so much "solve" wicked problems as make progress towards improvement or towards better managing them. We spell out a more realistic version of "progress". (p. 397)

These timely caveats notwithstanding, we consider it worthwhile to propose the concept of wicked problems as one among several potentially viable approaches to designing, conducting and evaluating research within the educational margins. We turn now to examine selected examples of such approaches, and in doing so to interrogate the applicability of wicked problems to this crucial research field.

The Applicability of Wicked Problems to Researching Within the Educational Margins

The purpose of this part of this chapter is to present a number of examples of how the notion of wicked problems has been mobilised in research focused on diverse manifestations of educational margins. In exploring these examples, we assert that the conceptualisation of wicked problems has a productive part to play in framing and informing such research, in concert with the specific strategies demonstrated by the authors of the subsequent chapters in this book.

One example of applying the concept of wicked problems to researching within the educational margins relates to the complex interplay between Indigenous population mobilities and school achievement. The second-named author (Danaher, 2012) noted that the:

> … list of characteristics of wicked problems resonates strongly with many
> of the propositions pursued … [in several accounts of this interplay], and
> at least partly helps to explain why the underlying situations depicted …
> [in those accounts] are often longstanding and seemingly intractable. (p. 7)

At the same time, those same accounts were effective in identifying
"specific strategies for enhancing Indigenous pupils' school achievement
outcomes" (p. 7). Similarly, Kelly, Clarke and Wildy (2019) argued in the
Australian context that "Remote, Indigenous students will not receive the
education they deserve unless the 'wicked problems' … that have been
described are resolved".

Researching also in the Australian context, Reid (2017) investigated
recurrent educational marginalisation against the backdrop of rural com-
munities. Positing "locational disadvantage as a wicked problem for a
social equity agenda" (p. 88), the author proposed the concept of "Rural
Social Space" (p. 88) elaborated by her colleagues and her as "a useful and
coherent theoretical resource for understanding and addressing this
[wicked] problem, and [for] rethinking the idea of community in ways
that are necessary for change to occur" (p. 88).

From a different perspective, Bastien and Holmarsdottir (2015)
deployed wicked problems as a lens through which to explore the possi-
bilities of mobilising young people's voices critically in engaging with
contemporary global issues. Against this backdrop, they conceptualised
wicked problems in terms of "the need to move towards transdisciplinar-
ity and systems thinking in order to adequately engage with and tackle
the global challenges currently facing youth and impacting [on] youth
transitions" (p. 2).

Mertens (2015) took up the enduringly significant wicked problem of
inequitable access to formal education. She highlighted the necessity:

> … to develop approaches to addressing the wicked problems of access to
> education for people in these contexts of adversity in a way that allows
> members of the communities to contribute to the understanding of the
> problems themselves; involves stakeholders from the policy, program, and
> community levels; and works towards solutions rather than only problem
> identification. (p. 3)

At the same time, Mertens acknowledged that these kinds of collaborations are not always feasible, such as when some community members are distrustful of and hostile towards particular government interventions.

Building on the distinction between wicked and tame problems outlined above, Walton (2017) analysed inclusive education in African contexts by posing the telling question whether such education is "a tame solution to a wicked problem" (p. 85). In particular:

> I argue that given the complexity of the [wicked] problem of educational exclusion we cannot afford a "tame" or watered down idea of inclusive education that is merely concerned with ways of "accommodating" learners with additional support needs in ordinary classrooms. Instead, it needs to be a social and political project that is bold enough to identify and challenge the impediments to meaningful inclusion and [to] make the radical changes necessary to ensure quality education for all. (p. 85)

Drawing on the practice and scholarly field of evaluation, which as some of the subsequent chapters in this book demonstrate can be a powerful ally in facilitating strategies to engage with educational marginalisation, Billman (2019) adumbrated four logically distinct yet interrelated "wicked problems facing the field of evaluation—What do we mean by theory? Whose ontology? Whose epistemology? Whose methodology" (p. iv). These profoundly philosophical questions accentuate the difficulties of reducing such problems to simplified responses or naïve panaceas.

Describing research that resonates powerfully with the first-named author's scholarship pertaining to the contributive needs of older men, Manchester, Barke and the Productive Margins Collective (2020) supported calls for "[c]ollaborative, co-produced research [that] is positioned as increasingly essential … in delivering public good and in finding answers to the increasingly 'wicked' problems that we face as social researchers" (p. 67). Their account of the discursive tensions attending these seemingly unproblematic calls focused on "the story of a research project that aimed to develop more equitable and inclusive 'regulatory systems' around the production of knowledge concerning the isolation and loneliness of older people" (p. 67) in the United Kingdom. A crucial corollary of the authors' concern with ameliorating the wicked

problem of such isolation and loneliness was to "challeng[e] regulatory systems in the social care and welfare systems that tend to portray social isolation and loneliness as an individual problems that individuals must solve themselves" (p. 83). Instead, the authors' research highlighted the necessity of "the mutuality inherent in any solutions to isolation and loneliness" (p. 83), and also of "[meeting] the needs of everyone involved, including the community organisation, the individual older people and the university researchers" (p. 83).

In a study that links with Jennifer Clutterbuck's chapter in the next part of this book, Andrews (2019) analysed the algorithms underpinning "big data" as simultaneously being posited as solutions to particular wicked problems and as constituting wicked problems themselves. Andrews demonstrated how an admixture of public value theory from a conceptual perspective, contextually specific strategies for ensuring appropriate governance and a body to oversee issues related to data ethics can be effective in addressing identified elements of this dual positioning with regard to wicked problems. From a different perspective, Pedler and Hsu (2014) advocated the complex processes associated with unlearning in critical action learning as helping to ameliorate "the wicked problems of organisations and societies" (p. 296).

A growing theme in the scholarly literature pertaining to wicked problems and educational marginalisation relates to methodological issues and resultant strategies. For instance, McDonough and Brandenburg (2019) identified "ethics in self-study as a 'wicked problem'" (p. 165), and we concur that self-study and autoethnography are appropriate to interrogate as potentially powerful methods for researching one's own experiences of such marginalisation. Moreover, McDonough and Brandenburg asserted that it is important to "identify the concepts and discourses associated with ethics and self-study that are dominant, present those that are silent or marginalised and offer suggestions for future research" (p. 165).

Also from a methodological perspective, Cook (2015) proposed Photovoice as an effective and decolonising method for exploring specific wicked problems in science and environmental education, including with students, teachers and community members in Kenya. This was based on the proposition that, "By contextualizing the study of sustainability in this way, science education research can assume the form of community engagement that is ultimately meaningful and maximally

impactful to teachers, [to] students, and to the local community" (p. 581). Moreover, by handing control of and responsibility for collecting and portraying research data to the participants, Photovoice affords opportunities for the empowerment of individuals and groups who inhabit the educational margins.

This discussion of particular approaches to addressing wicked problems was placed in a broader, and more critical, context by Lewis and Hogan (2019), who observed an increasing trend of "the uptake of so-called fast policy solutions to [wicked] problems in different education policy contexts" (p. 1). They analysed these solutions in terms of "fast policy and evidence-informed policymaking, which suggests that, in an increasingly connected, globalised and temporally compressed social world, policymaking has been 'speeded up'" (p. 1), often borrowing "'ideas that work'" (p. 1) from other countries. They presented three examples of such international borrowing, including the Programme for International Student Assessment (PISA) under the auspices of the Organisation for Economic Co-operation and Development (OECD). The authors expressed heightened concern that this kind of drawing on ideas "across vastly different policy contexts" could lead to a situation "in which similarly fast policies, and methods of promoting such policies, appear to dominate over potentially more considered and contextually aware policymaking approaches" (p. 1).

A different rendition of this broader and more critical context for interrogating the capacity of the notion of wicked problems to engage meaningfully and sustainably with particular manifestations of educational marginalisation was provided by Hayden and Jenkins's (2014) evaluation and critique of the Troubled Families Programme in England. Launched in 2011, this programme was intended to transform the lives of the 120,000 most "troubled" families in England by 2015. Hayden and Jenkins analysed the programme in terms of being a wicked problem, "in the sense that the issues surrounding these families tend to be reconceptualised regularly and re-solved differently, depending on changes in government" (p. 631). The authors acknowledged that behavioural changes were likely in some families, such as increased school attendance and reduced anti-social conduct and crime. Nevertheless, Hayden and Jenkins highlighted starkly the material constraints on the longer-term

success of such programmes: "addressing worklessness (a key focus of the programme) presents the biggest challenge" (p. 631); and "An even bigger challenge is helping families to find work that will move them out of poverty" (p. 631).

This part of the chapter has elaborated several instances of the application of the concept of wicked problems to research about and with variously marginalised learners and teachers. These applications have demonstrated the relevance and utility of this concept in generating new understandings of the causes, character and effects of educational marginalisation. At the same time, there are empirical and material considerations that sometimes constrain the possibilities of ameliorating particular manifestations of such marginalisation, in turn signifying the enduring complexity of wicked problems in this policy, practice and research space.

Conclusion

Despite—or perhaps because of—the heterogeneity and multiplicity of manifestations of educational marginalisation, researchers investigating this marginalisation have ready access to a large number, and a wide range, of conceptual frameworks that can frame and inform their respective studies. In this chapter, we have presented the notion of wicked problems as one such framework. In doing so, we have elaborated the defining features of wicked problems, and we have examined several contemporary illustrations of how this concept has been deployed effectively and productively to create additional insights into the multifaceted intersection between wicked problems and educational marginalisation. We have noted also some crucial caveats attending that deployment that have reinforced the complexity of both these phenomena.

Furthermore, the chapter has analysed some of these examples of the application of wicked problems to researching within educational margins in terms of particular strategies for helping to communicate and articulate the diverse voices and sometimes competing perspectives of learners, educators and researchers living and working within those margins. Given the characteristics that delineate wicked problems, including their interdependencies and their multicausality, it is vital that the

multiple and divergent worldviews of participants and stakeholders are sought and valued. The subsequent chapters traverse several different approaches to recording and analysing these worldviews.

In concert, the preceding chapter and this chapter have constituted the first part of this book, concerned with contextualising and conceptualising researching within the educational margins. We turn now to present the first chapter in the second part of the book, focused on researching with children and marginalised youth.

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Part II

Researching with Children and Marginalised Youth: Introduction

Patrick Alan Danaher

The six chapters in the second section of this book investigate the distinctive affordances, possibilities and risks entailed in researching with children and marginalised youth within the educational margins. Children and young people are often positioned as being "at risk", "marginalised" and "vulnerable" on account of their young age and posited immaturity, sometimes resulting in "responsible adults" speaking on their behalf, and thereby eliding their assumed agency and capacity for independent and intelligent action. By contrast, a growing body of scholarship supports the counternarrative that this agency and capacity have been demonstrated to exist, and ought to be acknowledged and celebrated. Certainly, there are particular ethical, methodological and theoretical considerations for education researchers working with children and marginalised youth, many of which are elaborated in this section.

In Chap. 3, Michelle Jayman presents a compelling and credible argument for articulating and valuing what she calls the "unique voice" of the child. This argument derives from the assumption, supported by considerable empirical evidence, that children can and should be enabled to communicate their experiences and perceptions of programmes developed and implemented to facilitate their learning. The author explains how a case study of a particular intervention in the United Kingdom exemplified the links between a child-focused approach and specific improvements in children's wellbeing and educational outcomes.

Chapter 4, written by Corey Bloomfield and Bobby Harreveld, evokes selected elements of the lifeworlds of variously marginalised young people who attend an alternative learning programme conducted in Rockhampton, Central Queensland, Australia. The authors interrogate distinctive ethical issues related to informed consent and insider status when conducting research with these young people. The chapter canvasses also logistical considerations related to this research, as well as the identified impact of these issues and considerations on understandings of youth voice.

Naomi Ryan analyses in Chap. 5 the particular affordances and limits of her ethnographic research about the effectiveness and effects of career development for marginalised youth enrolled in a flexible learning programme in South West Queensland, Australia. The chapter elaborates the consequences of different discourses and varied voices being articulated about the impact and success of that programme. The author engages comprehensively with the ethical dilemmas attendant on navigating these divergent expectations and understandings.

In Chap. 6, Jennifer Clutterbuck delves deeply into the performative and representational power of data in school systems to construct and govern marginalised students in particular ways. The author illustrates this argument through two examples of the unintended yet undoubted consequences of the application of OneSchool, an online student management system in Queensland, Australia. One of these examples pertains to Aboriginal and Torres Strait Islander students' Indigenous languages, and the other relates to a student's assimilation of performative data as signifying that student's identity as a "fringe dweller".

Chapter 7, written by Christian Quvang, explores adult narrated perspectives on childhood marginalisation as experienced in everyday school life in Denmark. These perspectives are gleaned from selected excerpts from an extended narrative by Nanna, a Danish woman with special educational needs. More broadly, the chapter celebrates narrative as a potentially empowering research method that can contribute directly to extending current understandings of educational exclusion and inclusion.

Finally in this section of the book, Karen Glasby uses Chap. 8 to explain her distinctive approach to mobilise the ethical possibilities of

researching with autistic individuals about their transitions to post-secondary school opportunities in South West Queensland, Australia. This approach included navigating between formal, nationwide ethical requirements on the one hand and the author's commitment to engaging appropriately with the study participants' agency, capacity and voice on the other hand. The resultant strategies constitute an effective method-ological innovation and an important contribution to the education research ethics scholarship.

3

Harnessing the "Unique Voice" of the Child for Programme Evaluation and Development in Education Research in the United Kingdom: Methodological and Ethical Challenges

Michelle Jayman

Abstract Children with high levels of wellbeing are more engaged in learning and achieve greater academic success. Conversely, psychological distress has a detrimental impact on children's learning experience and ability to achieve their potential. Effectiveness studies show that interventions can help students identified with socio-emotional difficulties, but few programme evaluations investigate process issues underlying behaviour change in recipients. Moreover, children themselves need to be engaged in the evaluation and development of services that affect them. This chapter discusses how behaviour change interventions can be fully understood only through the "unique voice" of the child, not through inference and assumptions on the part of researchers. A case study of a

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specific intervention illustrates how a child-focused approach was utilised to understand improvements in wellbeing and educational outcomes.

Keywords Children's voice • Evaluation • Interventions • Pyramid Club • Wellbeing

Introduction

Schools exist in almost all communities, and they are uniquely placed to support health outcomes owing to their wide reach and to the extended time that children spend there. They can provide an "enabling environment" (Royal College of Psychiatrists, 2013, p. 3) where individuals experience a sense of belonging and contribute collectively to the growth and wellbeing of others. The notion of the "nurturing school" (Lucas, 1999, p. 14) suggests that within the school setting children learn social and emotional skills that are protective factors for good mental health. Extensive evidence (Durlak, Weissberg, Dymnicki, Taylor, & Schellinger, 2011) associates higher socio-emotional wellbeing with improved educational outcomes, including school readiness, academic achievement and increased life chances.

The ideal of the nurturing school has influenced United Kingdom government policy (Department of Health [DH] & Department for Education [DfE], 2017) aimed at tackling the growing burden of children's psychological distress. A national survey (NHS Digital, 2018) identified 11.2% of 5 to 15-year-olds with a diagnosable mental health disorder, with the most common being emotional difficulties (e.g., anxiety and depression). Yet this presents only part of the picture, as statistics for children below diagnostic thresholds are not recorded, and research (The Children's Society, 2019) suggests that children's happiness is in decline: academic and sexual pressures, social media, bullying and negative body image are some of the contributing factors.

Mental wellbeing is clearly of fundamental concern to educationalists; poor mental health affects multiple, interconnected domains. Adverse effects include absenteeism, poor motivation and concentration, and

elevated risk of self-harm and suicide (Patel, Flisher, Hetrick, & McGorry, 2007). United Kingdom schools have been designated with responsibility for early detection, intervention and crisis management in relation to pupils with mental health difficulties, and, while undoubtedly, mental wellbeing should be at the heart of children's school experience, education staff members feel ill-equipped to manage increasing demands and competing priorities. Research suggests that this is becoming deleterious to their own wellbeing (Education Support, 2019).

Government-led calls for greater evidence-based practice in education have seen a rise in randomised control trials (RCTs) aimed at examining a range of interventions: over one-quarter of English, state-funded schools participated in an Education Endowment Foundation trial between 2011 and 2017 (Education Endowment Foundation [EEF], 2018). In a climate of diminishing funding and onerous teacher workloads, this was heralded as a positive step forward for the education system. RCTs are considered the "gold standard" (Akobeng, 2005, p. 840) for evaluating health interventions, and a meta-analysis (Taylor, Oberle, Durlak, & Weissberg, 2017) of 82 school-based socio-emotional programmes (mainly RCTs) demonstrated positive, long-term effects on pupil wellbeing and academic growth. However, according to Morrison (2001), RCTs promote a simplistic, decontextualised and atheoretical picture of the social world. For Cheney, Schlösser, Nash, and Glover (2014), "School-based mental health promotion programmes do not lend themselves easily to the 'gold-standard' randomised controlled, double-blind, objectively assessed approach to evaluation" (p. 414). Richer methods that move beyond effectiveness studies to consider which interventions work for whom, under which conditions and in which circumstances are needed (Pawson & Tilley, 2004).

A systematic review of RCTs in education (Connolly, Keenan, & Urbanska, 2018) comprised 40% of studies on health and wellbeing programmes, and such programmes were categorised as being with or without a process evaluation (defined in terms of using qualitative methods to provide a deeper understanding of trial findings). Nearly two-thirds either did not include or failed to report some form of process evaluation. Similarly, Mackenzie and Williams's (2018) review of school-based mental wellbeing interventions in the United Kingdom found that only four

(of 12) collected qualitative and quantitative data, and that only one explored mechanisms of change. Moreover, it was unclear to what extent (if any) children had been consulted in the process, design and delivery of interventions targeted at them, suggesting that children's contributions to intervention evaluation have been marginalised.

School-based approaches are key to the United Kingdom's settings-based strategy for ameliorating mental health for children. The implementation of successful initiatives in schools depends greatly on the quality and strength of the evidence, yet much work in this area is not sufficiently evidence-based (Vostanis, Humphrey, Fitzgerald-Yau, Deighton, & Wolpert, 2013). Furthermore, 40% of large-scale RCTs in the United Kingdom and the United States were found to have failed to produce any evidence as to whether specific educational interventions had been successful or not (Lortie-Forgues & Inglis, 2019). Methodologies that reject over-reliance on standardised measures and pre-held notions from researchers about what is important are required for more robust evaluations. This chapter makes the case for broader brush research methods that recognise the heterogeneity of pupil populations, school systems and cultural contexts, and above all that respect the unique contributions of children in evaluating and developing interventions and services that affect them. The author's commitment to harnessing the "unique voice" of the child afforded her the position of researching within the educational margins.

This chapter discusses the methodological approach and key findings from an evaluation study (Jayman, Ohl, Fox, & Hughes, 2019) of Pyramid Club, a socio-emotional intervention delivered in United Kingdom schools. Pyramid Club is aimed at shy, anxious and socially withdrawn children who have difficulty finding their voice in mainstream schools, and who are at risk of disengagement from learning and of failing to reach their potential. In this respect, they fulfil Hooks's (2000) criteria for marginalisation: "To be in the margins is to be part of the whole but outside the main body" (p. ix). Furthermore, in the context of dominant research methodologies for investigating interventions in education, children who participate in programmes like Pyramid Club can potentially find themselves doubly marginalised and doubly "voiceless". The current research was underpinned by the author's determination to

utilise child-centred methods that respect children's rights and that channel their voice. As primary stakeholders, children's views should be sufficiently represented in programme evaluations.

Philosophical Approach and Methods and Strategies to Empower Children's Voices

To engage in research requires considering one's philosophical worldview. In essence, a research paradigm is: "The net that contains the researcher's epistemological, ontological and methodological premises" (Denzin & Lincoln, 2011, p. 22). The Pyramid Club research was approached from a critical realist perspective (Bhaskar, 1975). This recognises the validity of different views of reality, and it enables a more flexible orientation for the researcher. Multiple domains of reality exist, distinguishing critical realism from other ontologies that focus on the realms of the actual and the empirical. "Objectivity" and the pursuit of scientific "truth" (characteristic of RCTs) exist within the parameters of particular values. A critical realist position refutes "certain" knowledge, accepting the possibility of alternative valid accounts. This contributes to a better understanding of social reality as reality exists on multiple levels.

An understanding of context is crucial to critical realist explanations, as this can help to elucidate the conditions that promote or hinder underlying mechanisms; therefore a critical realist approach is particularly appropriate in evaluation studies when the focus is not only on whether an intervention works, but also on how and why it works (Pawson & Tilley, 2004). Attention should be on the actions of individuals and groups as programmes become effective only if participants "choose to make them work and are in the right conditions to enable them to do so" (Pawson & Tilley, 2004, p. 294).

Whilst both emic approaches (which focus on the insider perspective e.g., the child) and etic approaches (which rely on the "objective" view of the researcher, typically adult) have value, Barriage (2018) insisted, "Investigations of matters related to children … will obviously be incomplete if their perspectives are not elicited" (p. 2), while Shenton (2010)

questioned the moral legitimacy of allowing one (more powerful) group in society to speak for another, with the associated risks of bias and marginalisation that this brings. Children's voices should be at the heart of programme design, delivery and evaluation. The reality of their world cannot be fully understood through inference and assumption on the part of adult researchers; thus children's insights (what is meaningful to them) result in better quality research outcomes (Lundy, McEvoy, & Byrne, 2011). A priority for the Pyramid Club research was to capture authentically children's voices, acknowledging, like Dewey, that "the child is the starting point, the centre, and the end" (Hickman & Alexander, 1998, p. 238).

Two key issues central to children's status in emerging research paradigms are power and emancipation. "Power refers to whose interests the research serves, who owns the research and who[m] the research is for. The emancipatory element challenges the legitimacy of research which does not empower groups [children] … who are either invisible or oppressed" (Kellett, 2005, p. 3). Enshrined within Article 12 of the Convention on the Rights of the Child (United Nations, 1989) is for children to have their opinions considered and their views respected with regard to the decisions affecting them. This seminal legislation challenged traditional thinking, and children have increasingly been viewed as active participants within the research process. Simply put, there has been a shift from research "on" to research "with" children (James, 2007). Although children's voice is articulated as a key principle in education policy and practice contexts, as well as in research, ensuring that their voices are meaningfully included and responded to remains a challenge.

A genuinely child-focused approach requires researchers to continually reflect on their roles and assumptions throughout the research, confronting conventional notions of the "expert" in researcher/participant encounters. As children are typically marginalised and lack power in adult-centred societies, they expect an unbalanced power relationship; they are not accustomed to having equal voice (Punch, 2002). Researchers must therefore consider how best to enhance children's willingness to communicate and their confidence to express their views.

Critical reflexivity is integral to the researcher's choice of methods and the subsequent application of those methods, as these decisions are

influenced by notions of competence (Punch, 2002). Alderson (2007) noted that, while adult participants are deemed to have competence (unless they show otherwise), researchers often assume that children are lacking in such competence. Misconceptions emanate from developmental psychology models that undermine children's capability to be involved in research. For Barriage (2018), a more helpful approach comes from a childhood studies paradigm that views childhood as a social construction and children as competent social actors marginalised in society. Children are experts in their own experience, and evidence suggests (Gray & Winter, 2011) that even very young children can engage in research. Children's competence should be regarded as different, not inferior, and child-centred methods should be adopted accordingly to capture their voices authentically and genuinely.

Task-focused activities (e.g., drawing, drama and games) offer data collection techniques that align with children's natural way of communicating (i.e., actively doing) (Barriage, 2018). These methods can address power differentials by affording children more autonomy, and they have been used effectively in conjunction with traditional methods (e.g., focus groups) (Jayman, 2019). Despite the appeal of these methods, Punch (2002) pointed out that some children, particularly older ones, are more inhibited by task-based methods; they may feel lacking in artistic/performing competence (made more salient in group situations), and not consider such activities fun or enjoyable. Moreover, adult-initiated arts-based tasks may be perceived by children as more akin to schoolwork.

To give voice to children evaluating Pyramid Club, a focus group method was selected. Focus groups generate rich, emic data, emerging in an indigenous form as participants direct the flow and interaction (Barbour, 2007). Although some children (like adults) feel more confident in a group, others may suppress or modify their feelings. Some may dominate the discussion, while others "follow the norm" rather than offering their own opinions (Heary & Hennessy, 2006). Despite these limitations, focus groups can provide a less intimidating and more supportive research encounter than one-to-one interviews. In group situations, participants are more likely to "own" the research space, adjusting power imbalances and typically affording "richer, deeper understanding of whatever is being studied" (Kamberelis & Dimitriadis, 2013, p. 40).

Furthermore, focus groups are free from the limitations associated with written methods (e.g., participants' literacy levels).

Consent for children's involvement in research must be gained from adult "gatekeepers". Kellett (2005) observed that, in the United Kingdom, the age of criminal responsibility is 10, but that at this age children do not hold commensurate power or control over any aspects of their lives. Nonetheless, ethical guidelines for research (British Psychological Society, 2014) stipulate that the overriding consideration should be consent from the child. That said, children may acquiesce when they are reluctant, and researchers must consider carefully identity perceptions, crucial for bridging the gap between researcher and participant, and for creating a more reciprocal and democratic research environment.

Punch (2002) warned against researchers being overly language conscious in framing questions. This may stem from pre-held notions of children's incompetence. Similarly, it is assumed that children are less reliable respondents. Children (like adults) may lie for several reasons, or say what they think that the researcher desires; however, if the researcher has gained their trust this outcome is less likely. In the Pyramid Club research, children were informed there were no "right" or "wrong" answers, and member checking was used to help ensure that the data remained true to the children's perspectives: the process of asking each participant to confirm or disconfirm individual voices and the interplay of voices (Creswell & Miller, 2000). This allows participants to contribute to the data analysis and to the construction of knowledge (Freeman & Mathison, 2009), and it is particularly pertinent for research with marginalised groups such as children.

Selected Findings from the Pyramid Club Evaluation

Thematic analysis (Braun & Clarke, 2013) was chosen as a contextualised method to analyse the data. Selected, anonymised extracts have been reproduced in Table 3.1 and in the supporting narrative. These reflect

Table 3.1 The voices of Pyramid Club children

Theme	Subthemes	Illustrative quotation
Perceived outcomes	Socio-emotional gains;	"It helped me with my confidence for making new friends" (Jessica)
	School performance effects	"I put my hand up more in class and contribute more in lessons" (Gabrielle)
Identity	Sense of personal change;	"I used to be really shy … I've got more confidence now to talk to people" (Freddy)
	Group identity	"You don't have to feel shy 'cos everyone is the same" (Becky)
Behaviour change procedures	Setting criteria;	"We had our own personally decorated mug" (Lucy)
	Delivery criteria;	"You get a chance to pick what you'd like to do" (Becky)
	Content criteria	"We could do more things and be creative" (Gollum)
Behaviour change techniques	Demonstration and practice;	"The Club leaders used to show us everything" (Princeton)
	Social reward;	"I enjoyed circle time … [Club leaders] were positive and made it fun" (John Paul)
	Social support (emotional);	"The best part was when we talked and shared things" (Jackie)
	Goal setting (behaviour)	"We played mini games just to get to know each other" (Ariana)

children's voices about the impact of attending Pyramid Club and why, for them, the programme was successful.

Pyramid Club provided a nurturing environment and was seen as a sanctuary from outside stresses including school worries (e.g., academic demands), "Say if you're having a bad week at school, you know that you've got these people there" (Ainsley). "Perceived outcomes" and "Identity" encapsulate children's Pyramid Club experience with respect to wellbeing and school performance. Socio-emotional gains and a sense of personal change emerged; improvements in targeted areas including social skills, peer relationships and emotional regulation were voiced. Furthermore, these new competencies were transferable; pupils reported increased confidence and social skills in wider school interactions,

supporting classroom learning, "Pyramid Club helps you work together with someone, not just alone" (Charlotte).

Behavioural change drivers refer to underpinning processes. "Behaviour Change Procedures" encompass contextual elements; these include characteristics of the Pyramid Club environment (e.g., creating a sense of belonging and connectedness), aspects of the delivery (e.g., a flexible programme and high adult to child ratio) and the suitability of the content (e.g., range of activities). "Behaviour Change Techniques" describe specific mechanisms of behaviour change, for example, Club leaders were popular and respected by the children (social learning), "She was like an older sister … like a role model for us" (Kawai). Children were encouraged to find their voice and everyone's contribution was valued (social reward), "I liked how we all got to say things out loud … everyone got to be themselves … usually you don't get to talk" (Becky). Children shared experiences and felt "safe" (emotional support), "We were all caring about each other … you can share and not be embarrassed" (Hermione). Children's accounts revealed they were not passive recipients of the intervention, but actively making choices in conditions favourable to behaviour change outcomes (Pawson & Tilley, 2004).

A sense of belonging and group identity were elicited, suggesting a link between connectedness to the group and children's response to the intervention (i.e., engagement in the therapeutic process). Connectedness can be affected by several criteria (Whitlock, 2006), for example, involving children in decisions, treating everyone equally, rewarding effort rather than achievement and building strong relationships, all features typical of Pyramid Club. Interventions which establish connectedness in one area of a child's life may have implications for others, including connectedness to school (broadly considered a protective factor which can support learning). Children reported increased participation and engagement in lessons and extra curriculum activities (e.g., after-school clubs), indicating greater connectedness to the wider school. In this respect, Pyramid Club "graduates" experienced a shift from their pre-intervention position of alterity; that is, from being socially inhibited and existing on the margins of the school community, to becoming active members of that community, thus transferring their status from "other" to successful "border crosser".

Towards a Research Paradigm in Education with Children as Active Researchers

The research discussed in this chapter was conducted against the backdrop of the United Kingdom Government's pledge to transform children's mental health provision and the increasingly significant role of schools within that commitment. Alongside these developments have been calls for evidence-based research to enable schools to make informed implementation decisions. To achieve this, the author has argued that researchers must move beyond effectiveness studies and apply appropriate qualitative methods to investigate process issues. Moreover, imperative to a richer understanding is children's voice.

Greater recognition of children's rights, alongside a re-conceptualisation of childhood with children viewed as competent social actors, has prompted researchers to engage children more actively in research. Furthermore, children's missing voice has been interpreted in relation to their marginalised position in society (Christensen & Prout, 2005). Whilst a democratic education system purportedly listens to the voices of all children, irrespective of age or ability (Noble-Carr, 2006), the challenge remains for researchers to involve children in ways that are effective and ethical. Those who "speak the rhetoric" of children's voice must back up their claims with demonstrable actions (McLaughlin, 2015, p. 10).

For Punch (2002, p. 337), it is impossible to define ideal methods for research with children and it is more useful to consider "research participant-centred" methods. This requires continuous critical reflection from the researcher in their selection and subsequent application. Whilst it is argued that innovative and creative techniques enhance children's participation and increase self-esteem and confidence, Waller and Bitou (2011) have insisted that children's empowerment cannot be mobilised by data collection methods alone. Additional consideration must be given to data analysis and interpretation, and the co-construction of knowledge throughout the research process. One strategy is to give prominence to children's words and, as reported, member checking helped ensure Pyramid Club children's voices had been authentically and genuinely captured. Moreover, children's words were "privileged" throughout

the analysis and dissemination phases. For example, pupil-to-pupil, "word-of-mouth", was recommended by the children to communicate their experiences to the school community; they took part in information sharing sessions at their school, thus reaching potential future beneficiaries. Peer-delivery has been acknowledged as an effective conduit for public mental health messages (Eisenstein et al., 2019).

Arguably, the trajectory from research **on** through research **with** to research **by** children is a natural progression. Following this rationale, the accompanying shifts in adult-child power and participation agendas pave the way for children in research to become successful "border crossers". However, Kellett (2005) warned of the need to avoid an empowering experience becoming exploitative. Furthermore, it is not just power dynamics between adult and child researchers that warrant attention, but also differential power relations among children; engaging children as co-researchers may upset power balances, it does not necessarily remove them.

Conclusion

Ensuring critically reflexive research practice is a constant mantra; researchers must be flexible, open and willing to try new ideas. Moreover, actions regarding interventions and services affecting children should have their rights and contribution at the heart. In the context of children's mental health and wellbeing, studies including children's lived experiences are lacking and an expanded research agenda is urgently required (Wolpert et al., 2018). As this chapter demonstrates, there is a compelling case for involving children in diverse ways across the research process and thus supporting children's contribution to knowledge. Well-planned, co-led approaches require commitment and resources but have a transformative capacity to empower children so they can influence decisions and policies affecting them (Dunn, O'Keeffe, Stapley, & Midgley, 2018). Children as researchers are a powerful channel for other children's voices; however, if adult researchers continue to monopolise the research agenda our knowledge will be impoverished. Moreover, practices and policies will remain adult-centric, marginalising children and ultimately failing to meet their needs effectively.

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4

Insiders and Outsiders: The Ethics of Insider Research When Investigating Australian Alternative Learning Environments

Corey Bloomfield and Bobby Harreveld

Abstract The young people who attend alternative learning environments (ALEs) are often termed as being vulnerable, disengaged or "at risk". They are learning on the margins of conventional schooling owing to "institutional othering" that impacts significantly on their transition journeys beyond secondary school. The avoidance of NEET (not in employment, education or training) status could be seen as a dominant discourse within ALEs. However, a narrowly focused curriculum can exacerbate existing barriers to crossing class borders by limiting opportunities for empowered young people to be socially mobile. This chapter explores ethical issues surrounding informed consent and insider status when researching with marginalised youth. The logistical issues that come with researching in this field are also considered, as is the impact that they have on youth voice.

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Introduction

Some young people are learning on the margins in "second-chance"
(Vadeboncoeur & Vellos, 2016, p. 307) alternative learning environ-
ments (ALEs). They are outsiders, vulnerable and potentially disenfran-
chised as "aliens on the inside" (Bauman, 2011, p. 3) of conventional
schooling. The "institutional othering" (Yeh, Borrero, Tito, & Petaia,
2014, p. 153) of alternative learning environments impacts significantly
their transition journeys beyond secondary school. A dominant discourse
within such ALEs is the avoidance of NEET (not in employment, educa-
tion or training) status post-compulsory schooling. However, findings
from a recent doctoral study investigating the learning experiences of
youth attending second-chance ALEs in an Australian regional commu-
nity suggest that existing power structures may exacerbate their alien-
ation by limiting learning opportunities for social mobility within and
beyond secondary schooling.

This study was located in five alternative learning environments
deemed to provide a second chance for young people 15–18 years old
who had been excluded or in some instances excluded themselves from
their local secondary schools. The ALEs were located in community set-
tings, with the curriculum provided by the regional school of distance
education. Flexibility was key to daily operations as these young people
had complex learning needs. At each ALE, they worked online at the
computers provided by the school, with learning support from youth
workers and volunteers from each particular community group and a
visiting teacher from the school of distance education. The school also
provided the services of a guidance officer for case management of their
educational and personal needs on a rotational basis. The young people
worked through self-paced short courses in literacy and numeracy, as well
as participated in health and wellbeing sessions led by both school and
community staff. Each ALE had its code of conduct, and the school's

prescribed courses and their assessment determined progression through the curriculum.

Researching within the educational margins of such second-chance ALEs is risky, especially for a novice, insider researcher. Thus, this chapter foregrounds the first-named author's evolving engagement with the research process through critically reflexive questions. The scene is set by querying how language within the literature pertaining to second-chance ALEs and the young people who attend them determines what counts as research and its guiding questions. Through a critique of the research design and implementation, we then question where agency is assigned in the research process, and therefore who benefits (*cui bono*) from the research (Coombes & Danaher, 2001). The findings constitute a self-reflective interrogation of whether this study has been an empowering experience for those involved. It is a cautionary tale of insider research, and the lessons that come from developing a critical awareness of the outsiders within educational margins.

What's in a Name? The Power of Language to Position

A researcher's choice of language when defining the scope of a study and choice of terms to describe participants has the power to position both researcher and researched. In the context of this research, alternative learning has been defined as non-traditional pedagogical approaches (Hope, 2019; te Riele, 2014; Vellos & Vadeboncoeur, 2013), and second-chance refers to how these learning environments are usually populated by young people who have disengaged from conventional schools (McGregor, Mills, te Riele, Baroutsis, & Hayes, 2017; te Riele, 2014; Vellos & Vadeboncoeur, 2013). Both terms hold power by positioning readers to view the learning environments in ways that assign value to their staff and students.

In education, the term "alternative" gains meaning and power through its contrasting "conventional" notion of schooling. Young people participating in this study also used the term "alternative" to describe their

learning environment. Another binary that depicts this differential power and positioning is the notion of margin and mainstream, with the margin problematised in relation to the mainstream of conventional school. Some researchers and practitioners acknowledge these terms, yet prefer the term "flexible" to describe these types of learning environments because they deem them to have less value judgement attached and less power to position learners in deficit discourses (te Riele, Wilson, Wallace, McGinty, & Lewthwaite, 2017; Thomas, McGinty, te Riele, & Wilson, 2017; Vadeboncoeur & Petry, 2017).

When referring to ALEs, "second-chance" is a term that describes ALEs that provide learning experiences to young people who have left secondary school prior to completion. The term positions young people who attend these ALEs as students who have failed to meet the expectations of conventional schooling (Vadeboncoeur & Vellos, 2016; Vellos & Vadeboncoeur, 2013). It also raises the question of whether there is a third chance or if it is perhaps the last chance for these young people to gain academic certification. For many young people attending second-chance ALEs it is their third, fourth or fifth chance at gaining some level of certification after being moved on from different conventional schools either by choice or by force, that is, through non-attendance, by exclusion or by cancellation of enrolment. Defining these ALEs as second-chance positions the young people within a deficit discourse where, for whatever reason, they have not been successful in their first attempt at learning through the conventional model, instead of positioning the conventional school as not meeting their learning needs. The term second-chance could also imply that it is the State's second-chance, through the education system, to ensure that the learning needs of these young people are met.

Young people who attend second-chance ALEs are often termed as being marginalised and are positioned as outsiders within the education system (McGregor & Mills, 2012; McGregor et al., 2017; M. Mills, Baroutsis, McGregor, te Riele, & Hayes, 2016; Myconos, Thomas, Wilson, te Riele, & Swain, 2016; Thomas et al., 2017). In many cases marginalised young people who attend second-chance ALEs have not contributed to high attendance, positive behaviour statistics and academic success measures while enrolled in conventional schools. In fact,

they damage such school statistics. Consequently, as much as is allowed by the legislation, they are channelled into second-chance ALEs that do not provide the same curriculum affordances as those in the mainstream system of conventional schooling (Caroleo, 2014; McGregor, 2009; M. Mills et al., 2016). They are what Yeh et al. (2014) called in their study of Samoan youth in schools as being "institutionally othered" (p. 153) where the demands of the education system do not align with the needs of the young people. They are outsiders within the State education system, as they are enrolled in school, but since they are not making any meaningful contribution to academic attainment data or attendance statistics, they are placed on the margins of schooling. The marginalisation of young people into second-chance ALEs could be viewed as a form of institutionalised social exclusion through the failure of the education system to accommodate young people's learning needs (Myconos et al., 2016).

The young people learning within the margins of conventional schooling are positioned by an alternative learning paradigm that has a strong focus on low-level vocational or basic skill attainment (Caroleo, 2014). This represents the ostracising effects of being labelled marginalised where choice of educational pathways to enable social mobility is limited. Researchers claim that learners in these second-chance ALEs are at more risk of entering NEET status due to this instrumentalist approach, with a lack of choice of formal academic pathways available to them through a well-rounded curriculum (Caroleo, 2014; Connor, 2006; McGregor et al., 2017; te Riele, 2007). This re-emergence of conventional, mainstream educative purpose of producing human capital has been seen as a dominant approach to ALEs that try to circumvent the pre-NEET pathways of these marginalised young people. These marginalised young people appear positioned by the State education system as human capital, "a mere commodity alongside others, the efficient use of which is essential to ensuring profitable returns in competitive markets" (Rodgers-Gibson, 2019, p. 3). While this instrumentalist agenda could be positioning these young people in this way, researchers who label them as marginalised and refer to their learning environments as second-chance could also be reinforcing that deficit discourse within the education system.

Which Questions Were Asked? Researching in the Margins

Both students and staff members were asked questions exploring their perceptions of whether and how learning needs were being met through these five second-chance ALEs. The power of the researcher in the choice of terms to define the context of the study and its participants has been considered above. This section now explores how decisions were made based upon insider knowledge and the constraints of the study being conducted by a doctoral level researcher (first-named author) with a limited budget. These constraints shaped the research design and led to critical reflection on how they potentially served to further marginalise those who were already learning on the edge.

Taking a critical ethnographic perspective (Fetterman, 2010; Thomas, 1993), the first-named author observed the day-to-day operations of the five ALEs, collected artefacts from each and conducted semi-structured interviews (8 students and 16 staff). Critical ethnography was chosen as the methodology because it allowed a synergy between ontological and epistemological perspectives that knowledge is a social construct influenced by power relations, with the possibility of participant involvement becoming an empowering experience (Fetterman, 2010; Wahyuni, 2012). While this choice of methodology can be justified in this way, researcher choice has dictated how this study has been designed without the knowledge or input from the young people it is described to be empowering. The research questions that guided this study were also constructed without consulting any potential participants. While they align with contemporary literature pertaining to second-chance ALEs, the staff and young people who participated in the study were not afforded the power to negotiate how and what was being researched. Even the scope of the study was predetermined by the researcher's capacity to engage in data collection by choosing to situate the study within the second-chance ALEs in which he worked. This meant that the time-in-field for this multi-sited critical ethnography was three years, with data collection taking place after ethics approval for a period of six months. By focusing on only five second-chance ALEs operated by the one school of distance

education within the same regional Australian context, the scale of the study was small. This was a conscious choice made by the researcher and supervisory team due to the purpose of the study, which was the researcher's doctoral candidature.

Whilst this provided a unique study, being the only alternative school that was identified as using an online curriculum delivery mode braided with face-to-face education support within Queensland, Australia, the researcher's decisions regarding convenience affected the scope of the study. With well over 2000 Queensland students enrolled in alternative schools across the state (Queensland Department of Education and Training, 2016), a broader study was certainly possible, just not practical for a doctoral study under the circumstances. The choice of geographical locations to conduct observations was affected by budgetary constraints, but also selected for the richness of the potential data collection. These choices were made based upon insider knowledge.

The research design incorporated a critical discourse analysis process that examined both the lived experience of the youth who attended these second-chance ALEs and the inherently complex power structures of each ALE's social context (Bourdieu, 1977). The vocational pathways that exist to enable sustainable social mobility for these students were also considered through examining the curriculum affordances that the school of distance education provided to each ALE. While the research design was approved by the researcher's university's Human Research Ethics Committee and by the Queensland's Department of Education and Training, the power of researcher choice cannot be understated as to the manner in which it shapes a study.

Who Really Has the Power? The Ethics of Insider Researcher Power

As researchers we are in positions of power, even more so as insider researchers (Breen, 2007; Floyd & Arthur, 2010; Mercer, 2007). The positional power of insider researchers, due to their pre-existing role in the environment, is an ethical dilemma that emerged from this study. The

power of the insider status as a researcher was a concern as the first-named author was concurrently working as the school's Guidance Officer. Insider status equated to power in this context as power came from insider knowledge. The power of the Guidance Officer role came from extensive experience working with young people in this education system. It centred around the role's premise of supporting marginalised young people, who as outsiders of the education system hadn't accumulated their own insider knowledge or education capital, to successfully navigate the education system. Even though this role was one of support for the young people in this ALE as a counsellor, there was insider knowledge of the education system and of students and staff through that pre-existing relationship. These power relationships and the ethical dilemmas that they posed will be explored within this section, as will how participant recruitment also proved to be an unlikely hurdle for an insider researcher.

These young people saw their ALE as different from a school, as did the staff. For many the ALE felt less like a school or institution and more like a home with a family culture:

> Compared to mainstream school […] the staff members care about your personal problems. (Joel, Student Interview, 2017)

> I know mainstream do try, but I think we got it better because we know them a little bit more intimately. (Margaret, Staff Interview, 2017)

> Here they're so supportive they, you know, drop everything to go help you because you are important here. There's people here that actually care. (Carly, Student interview, 2017)

The supportive family-like culture was described as "almost tribal" (Jerry, Staff Interview, 2017). As a researcher, this meant that upon entering the learning environment there was at times a sense of intrusion and at other times a welcoming sense of acceptance. In both roles as Guidance Officer and insider researcher each ALE would be visited on a weekly basis. The participants (young people and staff) would be there three to five days a week. This fringe dwelling in multiple roles had the potential to not just dictate the parameters of Guidance Officer insider status but

also blur both the participants' and researcher understandings of his identity within the learning environment.

It was necessary to ensure the credibility of the data in order to establish trustworthiness of the final account. This meant that while there was ease of access to locations, participants, archival data and artefacts due to the insider role, measures for managing preconceived notions of the ALEs, the people and the school had to be consciously addressed. Through critical reflection, issues within the research process were recognised and acknowledged, particularly concerning the power relationships, as well as accountability in both data collection and analysis. This was achieved through an initial critique of the first-named author's biography followed by regular self-reflective journal entries. These entries were discussed and analysed with research supervisors. It was essential to acknowledge how "personal biographies, experiences and politics" (D. Mills & Morton, 2013, p. 34) shape research interests. This provided recognition that the knowledge construction was partial and from both the perspectives of the researcher and those researched.

Each ALE site was visited on a weekly basis during the six months of data collection; however, the first-named author was not there experiencing the ALE culture as a student of the programme, or as a teacher, a volunteer, a facilitator/youth worker or an administrator. In order to further understand the learning experiences of the young people in this second-chance ALE from their emic perspective, interviews were needed. The risk was that neither interview participants nor the first-named author would always be able to distinguish between the role as Guidance Officer with counselling duties and the role as researcher with data collection duties. For this reason, he did not have clients as research participants. Australia's National Statement on Ethical Conduct in Human Research states that these pre-existing relationships "may compromise the voluntary character of participants' decisions, as they typically involve unequal status, where one party has or has had a position of influence or authority over the other" (National Health and Medical Research Council, Australian Research Council, & Australian Vice-Chancellors' Committee, 2018, p. 68).

This insider power was juxtaposed with lack of researcher power in the recruitment of the young people for the interviews. Many of them lived

very adult lives with competing priorities, but for some it may also have been from a mistrust of institutions. Even though the first-named author had three years' worth of insider status, more if you consider that many of the young people had known him as their Guidance Officer in their previous schools, the roles of Guidance Officer and of a university researcher both held positional power of institutional authority. This positional power may have influenced participants' responses. Responses may have been very different if the interviews had been conducted by an external researcher with no affiliation to the school. Staff responses may also have been affected by his leadership position with the school's institutional hierarchy.

Whose Story Gets Told? Assigning of Agency to Institutions

The previous section identified that the challenge of whose story was told was not as simple because power dynamics that were pre-existing in the learning environment as well as those that were created through the research process influenced this decision-making process. Even though being biographically situated within the learning environments of the ALEs and the school; being "culturally literate" (Trowler, 2011, p. 2); having ready access to the young people; and having had built a sense of trust through working in a support role, both logistic and motivational difficulties were experienced in getting the young people to tell their stories.

Participant recruitment difficulties were not just relating to ethical recruitment but trying to make it a priority for those young people to take home the information sheet and consent letter to be signed by a parent or caregiver was also fraught with complications. Many of the potential youth participants were living transient lifestyles, not always living at home or with strong positive relationships with their parents. For some their motivation to participate was limited. Even though the age of these young people (15–18 years) meant that they could be deemed to be capable of informed consent (National Health and Medical Research Council

et al., 2018), it was necessary to gain parent permission. This was due to this research being conducted in a government school context, where the department's ethical clearance meant parent permission was required in addition to the young people's consent (Queensland Department of Education, 2017). Therefore, assigning agency to the school as an institution of power became a necessity, which in turn shaped the stories that were told.

Who Benefits? The Provision of Knowledge and Voice to Empower Border Crossing

Whilst the transition pathways of the youth participants leaving the ALE have been recorded from the archives, whether their engagement in the research process itself had empowered them was not initially considered. The study's guiding research questions did not explicitly address this concern which emerged through critical reflection of the research process.

Considerations of participants' knowledge and voice can be explained through what Coombes and Danaher (2001) called the "*Cui bono*?" conversation, where it is essential for researchers to question who benefits or in whose interests does the research take place. They described it as one of the most enduringly significant questions to be directed at an educational research project (Coombes & Danaher, 2001). As the chief investigator and first-named author, I have certainly benefited from the research as it contributes towards my PhD. The education system, in the form of the schooling system, has benefited from the findings of the research through the workshops I have delivered to school leaders on engagement strategies for at-risk youth. During the interviews, knowledge of pathways for future education and work possibilities was voiced as well as constraints in some areas of the curriculum. However, hopes of audible and visible evidence of that aspect of the research process itself to impact this knowledge were not realised.

Conclusion

Conducting insider research with young people learning on the margins of the education system has raised questions about the power relationships within this second-chance ALE and impact on these young people's learning trajectories. The literature also exposed the impact of researcher decisions on who truly benefits from research (Coombes & Danaher, 2001). The following questions emerged.

Could an insider researcher actually empower marginalised young people by exposing the power of curriculum to impact relationships within second-chance ALEs and learning opportunities to avoid NEET status? In this study, the answer was, no. The first-named author had over a decade of teaching and counselling work with young people and his experiences with these ALEs via the school of distance education provided the impetus for this research. Immersed in the ethnographic experience, the insider-outsider dilemma encountered was similar to that experienced by the young people in the ALEs. At one and the same time, he was an insider to the education system in his guidance officer role; yet even as an ethnographic researcher, was no more than a fringe dweller working within the margins of each ALE's distinctive culture, its young people and staff.

As an insider researcher, was too much being asked of a research design that initially seemed to offer an empowering experience for marginalised young people and can a research design deliver; or, is this beyond any research design? The answer to this complex question was beyond the scope of the doctoral study, but provides fruitful avenues for further research. The affordances of critical ethnography are methodologically robust, with robust critical intent. However, for translational research impact, its potential is perhaps yet to be realised.

This chapter provides a cautionary tale for researchers working within the educational margins. It is a realistic account of what could be expected and the limits of research design in contexts of research such as this. While the research process did not reveal how to empower marginalised young people through such ALEs, it did lead to a critical awareness of the power relationships that constrained them. In the transition from

practitioner to researcher with its idiosyncratic border crossing experiences, critical ethnography has served to expose the inequity inherent within institutionalised learning. It has confirmed that the question of who truly benefits from research remains relevant, particularly for insiders researching within the margins.

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Navigating the Affordances and Limits of Ethnographic Research in Exploring Career Development for Marginalised Youth in an Australian Flexible Learning Programme

Naomi Ryan

Abstract This chapter elaborates the selected affordances and limits related to a recent exploration of career development for marginalised youth enrolled in a flexible learning programme in South West Queensland, Australia. Establishing positive relationships with those involved at the research site can be easy when there is mutual understanding of the value of the research. However, this can also raise the potential for issues to occur when the stakeholders are focused on their positive stories being shared on a wider platform. The discourse that emerges through ethnography may tell a different story. Navigating these expectations requires insight and sensitivity, whilst adhering to the ethical issues

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and answering the research questions. The outcome in this situation draws on the reciprocity that can culminate from the research findings.

Keywords Career development • Ethnography • Flexible learning programme/s • Marginalised youth • Reciprocity

Introduction

This chapter elaborates the selected affordances and limits related to communicating and articulating the voices of marginalised youth enrolled in a flexible learning programme (FLP) in South West Queensland, Australia. Youth (15–24 years of age) who are marginalised from mainstream forms of education potentially face a life of disadvantage. For a variety of reasons, youth can become marginalised in society, which can affect their engagement in education. Issues contributing to this marginalisation include a lived experience of mental illness, family violence, homelessness, experiences of bullying, low levels of numeracy and literacy, situations arising from low socio-economic circumstances or caring for a parent or guardian with an illness (te Riele, 2006a). Such difficulties can prevent students attending school which may result in them becoming excluded from the education system through non-attendance policies. There is also evidence to suggest that the mainstream systems do not suit everyone. Disengagement can be related to negative student-teacher relationships, strict school structures and/or the school culture and curriculum (te Riele, 2006b). These factors can result in some young people being re-engaged or re-enrolled into an alternative education programme, such as an FLP. Others, who may not re-engage in education and who consequently cannot find employment, face dire consequences of long-term unemployment and marginalisation (Lamb & Huo, 2017).

FLPs are generally aimed at re-engaging youth with education, assisting them to develop positive social and emotional wellbeing and preparing them to transition to further education, training or employment (te Riele, 2014). There has been considerable research conducted in Australia on the types of FLPs and their specific aims with regard to re-engagement

of young people marginalised from mainstream education (Mills & McGregor, 2016; South Australian Department for Education and Child Development, 2013; te Riele, 2012, 2014; te Riele, Wilson, Wallace, McGinty, & Lewthwaite, 2017; Thomas, McGinty, Riele, & Wilson, 2017). Most commonly, attendance at FLPs seeks to ensure that students are re-engaged with education in a safe and inclusive environment, improve their wellbeing and assist them to make transitions to further learning or work (te Riele, 2014).

The students attending FLPs often come from highly marginalised backgrounds that include poverty or other forms of discrimination (Mills & McGregor, 2016). Typically these students require assistance to improve their wellbeing. Lamb and Huo (2017, p. 15) suggest: "Participation in education, training and work is often used as an indicator of the wellbeing of young people". It therefore makes sense that wellbeing should become the first and foremost priority before learning can even begin to occur. The learning experience, however, needs to include career development interventions if there is to be a long-term focus on breaking the cycle of marginalisation (Rice, 2017). These young people require the knowledge, skills and resources to make career decisions and to plan for career transitions.

Literature Review

Young people become marginalised from education for a variety of reasons. This is mainly through their negative relationships with mainstream schooling, rather than their personal characteristics (te Riele, 2006b). Students who are marginalised typically have not been served well by the education system, as they may have been subjected to exclusionary practices or strict regulations, or required more specialised help than what could be provided (te Riele, 2006b). Common barriers relate to learning disorders consisting of low literacy and numeracy skills; bullying; low self-esteem; poor living conditions; difficult relationships with teachers or peers; and/or an inability to adapt to teaching styles, school culture and strict structures (Brotherhood of St Laurence, 2015; te Riele, 2006b). Students also experience alienation and, subsequently, marginalisation

through social divides, such as class, ethnicity, gender and sexuality (McInerney, 2009; Mills, McGregor, Hayes, & Te Riele, 2015).

Since the 1970s, educational reforms have resulted in considerable changes within the secondary schooling system in Australia in order to address such marginalisation. Low retention rates and reduced numbers of students completing senior education made way for policy changes that would aim to increase the number of senior school completions. Globally, policy reforms such as the No Child Left Behind Act (U.S. Department of Education, 2002) in the United States (US); Every Child Matters (Department for Education and Skills, 2003) in the United Kingdom (UK) and the Compact with Young Australians (Department of Education, Employment and Workplace Relations (DEEWR), 2010) in Australia have sought to address inclusion, retention and educational success of students throughout schooling. All of these reforms focused on raising school attainment through various interventions focusing on social inclusion and equitable education for everyone.

Specifically in the Australian context, the Council of Australian Governments' (2009) aimed to increase the Australian Year 12 (or its equivalent) completion rate for 20–24 year olds to 90% by the year 2015. This policy was further extended to the year 2020. In 2017 the completion rate for full-time students in Year 12 reached 84.8%. Overall, between 2008 and 2017, the completion rate for all students rose from 74.6 to 84.8% (Australian Bureau of Statistics, 2017). Three initiatives that contributed to the increase in these attainments included changes to welfare payments to ensure that students remain at school or are in training or employment until the age of 20, increasing the minimum school leaving age, and offering new vocational qualifications to increase the job readiness of students (Council of Australian Governments', 2009; Wyn, 2009).

However, many young people have still disengaged from education. This results in costs to the individual in terms of employment prospects, job satisfaction, living conditions, health and wellbeing, civic engagement and preparing for retirement (Lamb & Huo, 2017). The cost to the community is affected through the loss of taxes and productivity, and

expenses incurred to the taxpayer regarding increased government expenditure relating to health, welfare and crime (Lamb & Huo, 2017).

Even with national benchmarks, the policies aimed at increasing inclusivity and retention in education can also be attributed to further marginalising some of the most disenfranchised students and entrenching social exclusion (Peterson & Skiba, 2000; Savelsberg & Martin-Giles, 2008). For example, students reaching Year 10 (14–16 years old) who have no interest in being at school, or face barriers that prevent their participation and would rather get a job, are restrained by the policies that require them to be "earning or learning". Owing to their lack of qualifications and decreasing job opportunities in the blue-collar sector, where previous generations would have traditionally gained employment, they are forced to stay in a system they do not want to, or have difficulty, remaining in, adding to their further disengagement from learning (Savelsberg & Martin-Giles, 2008). Moreover, this has the potential for the student to complete irrelevant subjects or certificate courses that do not contribute to positive employment outcomes.

Youth who are marginalised from education additionally face structural barriers that limit their opportunities and ability to gain satisfactory employment or improve their living situation and wellbeing (Billett et al., 2010; Hampshire, 2015). As participation in education, training or employment is often used as an indicator of wellbeing for young people (Lamb & Huo, 2017), there is a clear link to lower wellbeing for youth who are marginalised. Their disadvantage increases. As McLachlan, Gilfillan, and Gordon (2013) highlighted in their report, youth who have low educational attainment are at risk of experiencing deeper and persistent disadvantage throughout their lifetime. Approaches to re-engaging youth with education include options to enrol in FLPs.

These FLPs are seen as a second chance for young people who become marginalised from the mainstream education system. FLPs operate in a number of different formats in Australia. Some form part of mainstream school classes, some belong to the mainstream school as an annex located away from the main campus, whilst others operate independently (te Riele, 2014). Whatever the format, FLPs share some common aspects. These include providing young people an avenue in which to gain education credentials in a safe environment where they can rebuild their

confidence and work towards gaining skills and knowledge required for successful transitions to work, life or further learning (te Riele, 2014). The interventions provided through FLPs are aimed at supporting students' academic, social, behavioural and emotional needs through innovative approaches to curriculum. In addition, these approaches are delivered with an explicit focus on inclusion, which may not have been successfully supported in mainstream school settings (Mills & McGregor, 2010; Riddle, 2015; te Riele, 2007).

Conceptual Framework

The study focused on determining the effectiveness of career development strategies that were employed in the context of a regional Australian FLP and examined how these impacted on the students' career development and wellbeing. The theories that were drawn upon were based on social constructionism that proposes "knowledge is sustained by social processes and that knowledge and social action go together" (Young and Collin, 2004, p. 376).

Savickas' (2005) theory of career construction places self-construction as central to an individual's career development and provides an explanation of the interpretive and interpersonal processes that individuals experience when constructing themselves and directing their vocational behaviour. The theory includes the processes of adaptivity (flexibility, willingness to change), adaptability (self-regulation, psychosocial resources), adapting (orientation, exploration, establishment, management and disengagement) and adaptation (satisfaction, success and development).

This study focused more specifically on the second process of adaptability. It was assumed that the young people enrolled in FLPs already possess the initial construct of adaptivity in that they have demonstrated a willingness to change their circumstances and committed to continuing their education in a flexible alternative mode. Savickas (2012, p. 157) suggested, however, that "adaptiveness by itself is insufficient to support adaptive behaviours. Individuals willing to adapt must bring self-regulation resources to bear on changing the situation." Career

Construction Theory (CCT) (Savickas, 2012) emphasises the importance of the meta-competency of adaptability to ensure that individuals are able to cope with the requirements of their career development in the twenty-first century (Savickas, 2012).

Within the concept of career adaptability, there are four dimensions. These are career concern, control, curiosity and confidence. Career concern focuses on looking to the future and feeling optimistic or hopeful about it. A lack of career concern in adolescence can contribute to pessimistic thoughts about the future and a lack of hope which can cause troublesome behaviours (Hartung, Porfeli, & Vondracek, 2008). Career control involves taking responsibility for the future and making decisions in relation to careers. A young person lacking in career control can find it difficult to make decisions and become uncertain about their future (Hartung et al., 2008). Career curiosity is the ability to inquire about and explore career options, which allows the adolescent to approach the future realistically (Blustein, 1992; Flum & Blustein, 2000; Patton & Porfeli, 2007, as cited in Hartung et al., 2008). Career confidence focuses on building problem-solving abilities and self-efficacy. Youth who lack career confidence may find it difficult to approach the future due to inhibition and low self-consciousness (Savickas, 2012). Adaptability is higher in adolescents who have fewer barriers, a broader range of interests and higher quality of life (Soresi, Nota, & Ferrari, 2012). This particularly supports and highlights the necessity to raise career adaptability in marginalised youth, allowing them to increase their success with career transitions post-school.

Research Design

Methods used in qualitative research vary depending on the researcher's paradigm. A qualitative approach utilising a social constructionist paradigm (Young & Collin, 2004) was chosen for this investigation. In the case of applying a social constructionist paradigm, the study was based upon a hermeneutical/dialectical methodology (Guba & Lincoln, 1994). This allowed the inquiry to focus initially on the concerns or issues of participants and "unfold through a 'dialectic' of iteration, analysis,

critique, reiteration, reanalysis" that leads to the joint construction of the case (Schwandt, 1994, pp. 128–129). In order to achieve these outcomes, the researcher selected ethnography as the qualitative method of inquiry.

Ethnographic methodology emerged from the interest in cultures and civilisations and their origins (Howell, 2013). Banister, Burman, Parker, Taylor, and Tindall (1994, p. 34) described ethnography as "perhaps the most quintessential qualitative research method". It involves studying the lived experience of a group over a period of time, describing and interpreting the patterns and reporting the outcomes (Creswell, 2013; Hammersley & Atkinson, 2007).

Ethnographic methods used for this study centred on participant observation, semi-structured interviews and physical data, such as documents and artefacts (Morrow, 2007).

The Recruitment of Participants

The study focused on gaining insight into the impact the FLP experience had on the young peoples' social and emotional wellbeing, self-efficacy, career adaptability and career goals. Therefore, the research site chosen was an FLP within the researcher's local area and in which there was a pre-existing relationship between the researcher's university and the site. This ensured that access to the site was easily obtained, as the stakeholders were appreciative of the relationship with the university and the opportunity for research to be conducted.

Teaching and support staff who participated in the study consisted of the Principal, Head of Department, subject Teachers, Teacher Aides, Social Worker, Guidance Counsellor, Industry Liaison Officer and Pastoral Care Group leaders. Student participants consisted of 13 current Year 10–12 students (age 15–18) and 3 past Year 12 students (age 18–19).

The FLP site selected was an information-rich case, which was of central importance to the research and met the conditions of a purposeful sample (Patton, 1990). In addition there was some convenience sampling, which can have an impact on diversity and credibility (Suzuki, Ahluwalia, Arora, & Mattis, 2007). This convenience sampling occurred when the teaching staff assisted with recruitment of students for

interviews. For example, after the teaching staff had advised the students about the project and encouraged their participation, only a few students followed up and completed the necessary consent forms to participate. On my visits to the FLP to collect the consent forms and conduct or arrange interviews, I observed one of the teaching staff asking particular students, on the spot, if they would like to be interviewed for the project. Even though I briefed the students about the project and asked them to provide signed consent forms before scheduling interviews, I was left wondering if this was an equitable approach to recruiting the students. I was concerned this approach situated students, who for various reasons were available on the day, willing to be a voice and would present a positive story, which could potentially impact the credibility of the results.

Discussion

The researcher's goal was to illicit information about the manner in which career development in FLPs contributed to students' wellbeing, self-efficacy and career adaptability. Information gleaned was largely applicable to address a gap in the current literature and to build upon what was already known about the effectiveness of FLPs and provide recommendations based on the evidence.

From the results of observations and interviews, positive outcomes emerged that indicated students' wellbeing improved whilst they were attending the programme. It was also observed that their self-efficacy increased as they undertook work experience placements and were achieving success in their academic subjects. However, from the interviews with past students and the students who were about to complete Year 12, it became evident that several students had not developed the career adaptability competencies that could assist them to overcome barriers to make successful career transitions. For example, some students reported that they were unemployed up to two years following their completion of school. They further discussed the impact of this unemployment on their wellbeing. In essence, the interventions provided at the FLP were effective in the short-term, however may not have necessarily built career adaptability in the students to ensure long-term positive career transitions.

From the beginning of the research project the stakeholders were willing participants as their professional investment in the work they undertook indicated a desire to share their knowledge among the flexible learning sector and wider community. They displayed a great depth of passion and pride and demonstrated a sense of responsibility to showcase the work they do within their community. Participants expressed a desire to use the research project as an opportunity to negate the misconceptions that existed within the local community with regard to the purpose of the FLP and the type of students who enrolled in the programme. They believed their work with the students was an outstanding success and wanted the positive stories shared. Paradoxically as the research evolved, it was expected that not all outcomes would be positive, and there could be aspects of the programme that may benefit from interventions. It was at this point that tactful approaches to progressing the research were extremely important. After discussion with research supervisors, it was decided that a shift in the concern over reporting negative results to one where a reciprocal arrangement could be developed was required.

To enact reciprocity it became necessary to further question stakeholders about their approaches to career development and understand from their perspective how useful such approaches and interventions were in relation to influencing students' outcomes. As an experienced career practitioner, it was at this point, the teaching staff recognised I had credibility in this field and that I could be relied upon for consultation in relation to ideas for embedding career development interventions into their practice. I became more adept at discussion with the Head of School regarding the outcomes of the research as the project progressed. This enabled respectful communication and paved the way for further follow-up with all staff when the research was completed, thus ensuring reciprocity through highlighting the outcomes and offering suggestions.

In addition to the change of focus in approaching the research as a reciprocal arrangement, there were other issues that presented throughout the study that highlighted concerns around gaining information from the most marginalised young people. It became evident that establishing contact with past students was going to be a challenging endeavour. The few participants who volunteered were actually past students

who still had some connection with the FLP and were relatively easy to connect with. This in itself raised the issue of whether the sample was reflective of the overall cohort or, whether, these students were already positive about their experiences within the FLP, hence their ongoing relationship with teaching staff. This, therefore, presented a narrow sample. It would have been beneficial to recruit a larger cross-section of the past students to gain a better understanding of the experiences from a wider perspective. For example, students who may have left the programme early could have been invited to participate. Those students may have left the programme for a variety of reasons. Also students who were unemployed, suffering from mental ill-health or substance abuse may have found it too difficult to share their experiences with a researcher, which would again limit the type of experiences reported.

Conclusion

Ethnographic methods were employed by the researcher; however, whilst there were strengths in this approach, the findings suggested that participation of educational fringe dwellers may be a delicate process which, without due consideration, may lead to biased results. The non-participation of some students in the study could exacerbate the plight of those situated as learning on the edge, in that their individual voices may remain unheard.

It is suggested that wider research within the FLP space be conducted to look more deeply at a variety of programmes from which to access participants who have left the FLP and are no longer engaged with the school in an ongoing basis. Innovative ways of making contact with past students need further consideration. For example, staff contact previous students in the following year after they complete school to establish the outcome of their transition to further study or employment, and they may also ask students to return to the FLP to mentor current students, to provide information regarding their journey post school or to attend social events. Through these particular contacts with past students, staff could establish whether the students are willing to be contacted for future research in relation to their post-school transitions. Alternatively, rather

than relying on school staff to contact past students, researchers could connect more widely with other services that past students may be accessing in the community. This may involve contacting employment agencies or community organisations and asking to advertise a research project through their networks.

Researching in the margins allows incredible opportunities for the researcher, not to just tell the story of the participants, but to reciprocate by way of providing assistance that can make a difference to those marginalised from education. To become successful border crossers the researcher can help build the capacity of the educator working in the FLPs through productive reciprocal relationships. Looking for opportunities to reciprocate as a researcher is a valuable and effective way of facilitating avenues for participants to achieve successful career transitions. It is not only the voice of the marginalised young people themselves but the voices of the educators, welfare and support staff that need to be considered. The teaching and support staff members volunteer their knowledge and experience in support of educating and engaging marginalised young people; however, it is often they who require support to build their capacity to continue to do so. A long-term relationship with the research site can be developed and nurtured as a way to continue to provide support and could lead to further evaluation and research opportunities in the future.

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6

Digital Margins: Constituting and Challenging Inequity Through Data Infrastructures in Queensland Education, Australia

Jennifer Clutterbuck

Abstract This chapter addresses the manner in which marginalised students are viewed, governed and even "created" through the performative and representational power of data. Data infrastructures have become the means by which power is exerted over others, so that it creates the subjectification of the datafied student.

Data infrastructures govern educational practices globally in ways that constitute, maintain and challenge inequity. Two situations are presented in which OneSchool (an online student management system) governs the educational practices in Queensland, Australia. Firstly, I discuss how Aboriginal and Torres Strait Islander students' Indigenous languages were rendered invisible to policy-makers. Secondly, I analyse how a student's

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acceptance of the performative character of data became the datafied version of that student, thereby accepting that student's representation as a "fringe dweller".

Introduction

This chapter draws on a research project that explored how an online management system governs the educational practices in Queensland, Australia. Identified within the research was the manner in which marginalised students were viewed, governed and indeed even "created" through the performative and representational power of data. This discussion is framed around the manner in which data and data practices were in turn governed by digital infrastructures in ways that constituted, maintained or challenged inequity. The author offers insight into methodological framing of strategies for communicating the manner in which certain voices are marginalised.

The crafting and trial bricolage approach (Cartel & Boxenbaum, 2019) and the resultant prototyping of methodological process and product are addressed. These methodological prototypes are offered to researchers to spark future methodological and social imaginings that progress the complicated processes of researching the objects that digitally govern our world.

Two situations are presented that illustrate the processes in which the governance of digital infrastructures is implicated in the marginalisation of students. Firstly, the way in which a student ("Simon") readily accepted the performative nature of data with the result that he accepted a datafied creation of himself. Viewing his own data through particular technical and social lenses, he came to mis/understand himself as other than he was, with adverse effects for both his behaviour and learning. Secondly, the governing role of infrastructures over school enrolment procedures and practices was recognised as being implicated in the rendering of students' Indigenous languages as invisible to policy-makers.

The manner in which infrastructures have become the means through which power is exerted, creating the subjectification of datafied students as they are pushed to the educational margins is discussed (Bradbury, 2019; Lupton & Williamson, 2017). This chapter alerts researchers to the performative and problematic practices that lead to particular voices becoming marginalised and offers methodological approaches as explorative tools.

Crafting a Methodological Bricolage

The methodological bricolage developed into an original and complex arrangement, bound by the author's onto-epistemological (Barad, 2007) view of the world as interconnected and relational. This approach led to research that was conducted predominantly through a process of ethnographic perspectives, interviews, genealogical determinations and discourse analysis.

The research focused on the school management system *OneSchool*. The OneSchool infrastructure is understood as a network of technologies that assembled around data, and through digital means stored, shared and consumed student data (Hartong, 2018; Kitchin & Lauriault, 2015). OneSchool was built by the Queensland government and has operated across all state schools since 2008. In addition to the in-house build, researching OneSchool was facilitated by the author's insider positioning as a past employee. A seldom available organisational view was furthered by the inclusion of participants from Queensland's state education sites including central and regional offices, and schools. Educational management and school leader participants provided a view of how the practices and relationships of the genesis of OneSchool governed the current OneSchool discourse.

A Foucauldian Lens

The purposeful selection of approaches for the bricolage was explored, crafted and trialled in a process of recursive cycles. These "bricolage cycles" incorporated amendments to the methodological selections rather

than resulting in any pass/fail outcome (Cartel & Boxenbaum, 2019, p. 42). Thus, a Foucauldian lens was critically applied to a field that did not exist when Foucault himself was theorising.

Foucault's ideas on governance, power and surveillance were considered critically and applied to understand how contemporary education was digitally governed. In this way, key digital governance concepts such as dataveillance and datafication were considered as the digital rendering of Foucault's theorising of surveillance and brought together theory with practice.

To understand how infrastructures such as OneSchool are implicated in practices that marginalised particular learners, a genealogical approach was used to determine the social, political and technical history of OneSchool's current use. Current discourses and discursive practices could not be studied or understood if separated from the particular socio-historical circumstances in which they formed and were sustained (Foucault, 1991). The context into which policies and practices entered were often ones of pre-existing inequality (Ball, 1994). Recognising such contexts exposed the relationships involved in the circulation of power. Thus, understanding how infrastructures were governed assisted in determining how the infrastructures themselves governed educational practices.

Ethnographic Perspectives Arising from Insider Positioning

Researcher observances of the happenings within Queensland state schools and corporate offices throughout a 37-year state education career were drawn on to recognise the affordances and agency that existed within and between such structures. An "ethnography-as-perspective" approach enabled the presentation of how real people dealt with real situations, within real educational communities (Blommaert, 2018, p. 2). Personal involvement in the everyday "struggles taking place" was identified as important when researching areas of "political meaning" (Foucault, 1980, p. 64). As an insider researcher the author thus had the means to analyse and understand Queensland's educational organisation through

encounters with both individuals' social and cultural behaviours and global organisational patterns.

Insider positioning within both educational management and school environments broke down many of the barriers that delineate the hierarchical levels that exist within educational organisations. However, simply being there, or being of there, was insufficient to the determination of not only what happened, but how, why and more importantly the consequences of those happenings. Foucault argued that "people know what they do; they frequently know why they do what they do; but what they don't know is what what they do does" (Foucault in Dreyfus & Rabinow, 1983, p. 187).

In other words, within the context of this research, the people within policy and data assemblages generally knew what they did and why they performed particular tasks. Policy officers knew the intended purpose of the policies they created. Technical developers knew that their lines of code created functions that would be used to enact those policies. Teachers and school leaders knew how to employ a range of digital infrastructures to gather data for themselves or to ensure they complied with mandated policies. However, little was understood about what governance through digital infrastructures "does" (Foucault in Dreyfus & Rabinow, 1983, p. 187) to humans (students, teachers, policy and technical officers) and non-humans (policy, data, infrastructures).

A Mutual Entailment of Materiality and Discourse

Data gathered from over 70 interviews with educational management and school leaders were analysed to determine the manner in which OneSchool governed educational practices in Queensland. The established bricolage of theoretical and conceptual tools resulted in the prioritisation of identifying and understanding the discourse of OneSchool's digital governance. Within the analysis, discourse was considered beyond text, language and communication, to include the relationships and circulation of power between individuals (Foucault, 1991).

Discursive practices were identified as mutually constitutive of the boundaries within which such practices existed (Barad, 2008). These

boundary-creating discursive practices were revealed as participants' narratives were analysed exposing the importance of how data, policy and digital infrastructures inter and intra-acted. From this analysis, it was established that in addition to the importance of discourse, language and culture, the very matter of the governing infrastructures also mattered (Barad, 2008).

Participants' positive reactions to OneSchool within its sometimes problematic governance revealed its "thing-power" (Bennett, 2010 p. xvi). The effects and affordances of OneSchool's governance of educational practices are used to show the vital materialism of infrastructures. In this way the view of infrastructures to both "impede or block the will and designs" of educational management and school leaders, as well as their ability to act as a force seemingly of their own accord is recognised (Bennett, 2010 p. viii). Thus, the vital materiality of data infrastructures is implicated in marginalising students as they are rendered into datafied versions.

Meeting the Datafied Student

The OneSchool state school management system was coded to the student level—that is, all data were attached to the student entity rather than to any specific school or assessment. Therefore, wherever a student went within the state education system, their data travelled contemporaneously. Students journeyed through their education as "human-data assemblages" (Lupton, 2018, p. 1), continually assembling and reassembling with their data. The wide range of Queensland educational personnel able to engage with this datafied student through the OneSchool interface was authorised by a range of permissions reflective of state and national security and privacy legal requirements.

Differentiating between the discourse of the physical student and the virtual datafied student was at times indistinguishable. "Michelle", a Regional Office bureaucrat and previous school principal, spoke of how she accessed newly enrolled students through OneSchool:

that concept of there being one place, one point of truth for every child is so important. I think to me being able to look at kids as soon as you get an enrolment. … Oh, my god. … I mean, all of the data comes with them.

This comment revealed how even prior to students' physical arrival they were "seen" and "known". The digital governance of data that led to the immediacy of access to students' information introduced how students were viewed and experienced *as* their data.

Whilst the governance of data *by* digital infrastructures was made visible through the available data fields on interactive screens, the governance *of* those infrastructures remained mostly hidden. Determining how students' enrolment data were gathered and recorded revealed the technical and political governance of the OneSchool infrastructure. The technical governance of data is often viewed as the panacea to all problems; however, the role of infrastructures to provide equitable and socially just governance remains contested (Selwyn, Henderson, & Chao, 2015). Questioning the governance of infrastructures exposes problematic silencing and negative constitutive effects that maintained the marginalisation of particular students.

Becoming Your Data: The Datafication of Students

The increased use of digital governance in the educational field and the acceptance by students that they are accurately represented within that data led to unintentional consequences. It had become "known" amongst a group of secondary students that a "+" (plus sign) next to a name indicated, in their words, a "mental plus" student. As the class roll was mistakenly displayed on the whiteboard, "Simon" saw the "+" next to his name and readily accepted that he had mental health difficulties.

Simon made assumptions based on how he and his peers misunderstood the classification of their data. In doing so, the data came to establish the "realities they claim to measure" (Perrotta & Williamson, 2016, p. 2). Or in this case, the realities that the student *assumed* that they measured. The "+" actually indicated that there was further information available for the teacher—in this case it related to his mild asthma.

Simon was overheard referring to himself through comments such as, "I can't do those things. I'm retarded." A secondary teacher concerned with Simon's deteriorating attitude towards himself and his schooling questioned him about the negative self-talk. Simon replied, "I'm a mental plus student". Once Simon had viewed that he was a mental plus student he not only accepted this view but became this datafied version of himself. Simon's reactions illustrate how students face the challenge of interpreting and making sense of data that not only shapes them but socially positions them.

Students readily accepted the role of data and dataveillance in their lives, in shaping their very "dispositions, values, beliefs, and behaviours" (Nemorin, 2017, p. 11). Interpreting and making sense of their data remained problematic while governing infrastructures existed outside of their sovereignty. That students like Simon were "becoming" their datafied selves and positioning themselves as marginalised is of concern. When the reality of the data classification was explained to Simon, he recalled his asthma. However, he continued to position himself through his words and actions as a student on the margin of the general student population. Whether Simon's interpretation of the data classification aligned with his perception of himself, or if his self-perception altered in ways to realise the truth in his interpretation of the data, is unclear. Simon accepted that his data were available to others and that they were used to constitute the nature and "truth" of himself and his peers, not only as students but as people.

Enrolment Data

The OneSchool infrastructure included students' academic achievement, behaviour, attendance and personal data gathered at enrolment. The enrolment policy constituted two main artefacts—a paper form to be completed by parents or carers, and the OneSchool Student Profile module into which enrolment data were officially recorded. Therefore, differences between governance by data infrastructures and by non-digital means over enrolment practices became visible.

Data collected through printed forms and transferred into digital infrastructures digitalised the enrolment process, thus enabling the classification and algorithmic interrogation of students, schools and the effects of policy. The use of infrastructures was recognised as removing the view of policy from educational practices. A central office bureaucrat explained that, "if you are using a system, then it's the system you are really interfacing with, not the policy; even though the system interfaces with the policy".

As OneSchool became the "face" of the enrolment policy, a regional educational management officer questioned whether school users were aware that by filling in the data fields on the screen, they were indeed engaging with the enrolment policy. They posited, "Schools have always enrolled students, but now they're enrolling students through the OneSchool platform and I don't think they actually realise that they are enacting policy".

While both the OneSchool infrastructure and paper enrolment form were governed by the same policy, the governance by OneSchool dominated. "Anna", a school administrative officer, commented that the form was "ridiculous; it's so un-user-friendly". She further explained that the official form "doesn't flow with the screens that you fill out on OneSchool, so a few schools have chosen to change it—now you're not supposed to". The misalignment between the form and online screens revealed technical governance at play as school processes became aligned with OneSchool infrastructure. In doing so, the infrastructure became supportive of schools' resistance to the original enrolment form, while maintaining the parameters of the policy. Anna explained that the alternative forms designed to align with OneSchool's screens were "just presented more user-friendly for a parent and more user-friendly for us to use. Surely the layout of the form shouldn't matter?" This comment indicated the manner in which infrastructures that move beyond their material representations of either paper or screens mutually constitute the "social relations, desires and beliefs" of those who engage with them (Sellar & Gulson, 2018, p. 64).

Data were freed from political governance as official enrolment forms were amended at individual school sites, allowing for additional information to be recorded beyond the original data fields. However, as OneSchool

entry digitised these data, political governance was enabled by infrastructures' technical governance. Technical governance included restricting fields to particular data (alpha/numerical), limiting length of data (character limits) or limiting data choices to dropdown selections. Resistance against policy conducted as data were entered into the margins of a paper form was negated as infrastructures' data fields demanded compliance and limited the data. It was this blend of political and technical governance that highlighted not only the normative and generative nature of data, but also the reductive (Lupton, 2018).

Rendering Indigenous Languages Invisible

The reductive characteristic of data was evidenced in the problematic recording of languages spoken by Aboriginal and Torres Strait Islander students. Indigenous languages spoken in Queensland include both traditional languages as well as a range of "English-lexified contact" languages (Angelo, Fraser, & Yeatman, 2019). "Julia", a school leader, explained that although information could be written on printed enrolment forms, when it came to entering data into OneSchool:

> I don't get a choice for all of the languages that the kids speak. We had to make a decision at the school whether we record their languages as "Aboriginal English" or we call them "Other Indigenous Languages". So, you are losing a whole cultural identity of the Indigenous people at this school; it's criminal.

Viewed by Julia as "criminal", the technical governance of data was recognised as not only reducing the information available to represent individual students but reducing the identity of a cultural group. The technical governance of Indigenous language data by the OneSchool infrastructure limited the data available. Data that were considered capable of informing and challenging the social and political understanding of Indigenous students' educational needs. The limiting of this data revealed the inequitable "operation of power" (Selwyn et al., 2015, p. 768).

Inequities were amplified as infrastructures' "thing-power" (Bennett, 2010, p. xvi) created user expectations that *all* important data would become available. Therefore, if particular data were not captured, they were deemed of less consequence than others in educational decision-making (Beer, 2016). The reductive process of simplifying Indigenous languages to two broad categories rendered invisible the broad range of Indigenous language information and resulted in partially created data-fied identities of students who spoke Indigenous languages. A regional office bureaucrat argued that, "you can really ostracise families and young people who are marginalised anyway, because it's prima facie; it is as it is on screen".

The recording of Indigenous languages within OneSchool was governed by Queensland's enrolment policy, which in turn was governed by the Australian Bureau of Statistics' language lists. These lists resulted in reductive data that reduced the view of Indigenous language usage (Karidakis & Kelly, 2017). This incomplete data entered into the historical inequity of Indigenous languages and culture within Australia. For data to provoke a social or political response, there must be concurrently an understanding of why such data matter (Jasanoff, 2017). Paradoxically, data must be seen to matter if infrastructures are created to collect and manage them.

School leader Julia described their language data as problematic. She observed that "it doesn't represent at all what is going on here, not at all". Even as an influential school leader, Julia felt powerless to affect the enrolment policy that governed the infrastructure:

> The system has to fix that. It has to go back to Indigenous Education in Central-office and hopefully they'll do something with OneSchool people, because they're the ones that have to talk to each other. Schools can't, schools don't have the capacity to fix that type of thing.

Julia's frustration was linked with how OneSchool's governance over data practices led to "broken data" (Pink, Ruckenstein, Willim, & Duque, 2018) that misrepresented both the students and the school's valuing of Indigenous language and culture:

> When we are trying to get additional support for the language stuff, we can't, because we don't have a true picture on OneSchool about what's really happening. No matter what way you try and get your data report, it is always going to say the wrong thing because I can't put the right data in.

New problematic realities were created through the use of infrastructures by the digitalisation of educational data. The data governance of these realities needs to be understood within the recognition not only of how infrastructures govern the data but of how those infrastructures themselves are governed.

Conclusion

The two case studies discussed demonstrate the ways in which the imbrication of data, policy and digital infrastructures is fundamental to the emergence of "new modes of educational governance" (Gulson & Sellar, 2018, p. 12). The inter- and intra-actions that bound policy, data and digital infrastructures together were identified as forming the author-titled "Datafied Policy Space". Spaces such as the Datafied Policy Space are viewed as being mutually constitutive of the very power relationships that inhabit them (Allen, 2011). The disciplinary and political power of this Datafied Policy Space is recognised and understood as governing those positioned within educational margins.

Individuals and groups positioned within the margins of education are silenced or misrepresented within policy by data governed by infrastructures built to align with government priorities or commercial profits. Simon's experience demonstrated that the practice of marking an attendance role (a seemingly simple process) was found to marginalise those who misinterpret the classification of their own data. Secondly, the technical governance of enrolment practices rendered Indigenous languages invisible, and thus data's ability to effect change impotent. Educational practices governed by infrastructures are viewed as amplifying the "disciplinary power" of digital data in ways that controlled their affect (Nemorin, 2017, p. 13).

This chapter concludes with suggestions for future research that seeks to further understand the role of digital governance in positioning students in the margins of educational discourse. I offer researchers and those with whom they travel—who may themselves be marginalised—a series of questions. These questions relate to how data and data infrastructures govern in ways that maintain, challenge or create inequities.

Educational data are viewed as "fuelling increasingly complex forms of software" (Thompson & Sellar, 2018, p. 139), thus a paradox is created. Data that govern infrastructures, that govern the data, are viewed as "fuelling" more complex infrastructures. Who, though, is creating these infrastructures, for what purposes and to what effects on education, teachers and students? (Lingard, 2019).

Recognising that many data are personal, I form the question: What is the data representing me? In this way data and data infrastructures may be analysed to determine how different groups and individuals are viewed by those governing the human and non-human components of data and policy assemblages. In considering what data is missing, it is important to consider that the omission may be due to the viewer's restricted access to the governing infrastructure. Restrictions that may be due to security or limited user capability.

The impact of limited data literacy skills is a problem in the making. The "risk of deprofessionalisation" awaits those for whom the "digital disruption" to their professional abilities reduces them to fringe dwellers within their educational profession (Wyatt-Smith, Lingard, & Heck, 2019, p. 1). How, therefore, are professionals governed by their data literacy skills? Conversely, how are data governed by current educational data literacy skills? Additionally, what data literacy skills are required for students like Simon, to understand how they are represented within data and data categorisations?

We live in a world where our roles within society and our very core are being constantly digitally recalibrated. Digital recalibration of the "truth" of who we are within society is governed through the entailment of the discourse of the educationally marginalised and the materiality of infrastructures (Barad, 2007). Infrastructure affordances that establish how individuals or groups exist and are seen to exist within society have been presented. It is to be noted that infrastructures are both governed

and governing the measures and therefore the inequities within those measures. Governance *of* infrastructures needs to be considered if the governance *by* infrastructures over the humans and non-humans implicated in the marginalisation of individuals and groups is to be challenged.

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7

Adult Narrated Perspectives on Childhood Marginalisation in Everyday School Life in Denmark

Christian Quvang

Abstract Educational exclusion and inclusion generate additional insights when they are theorised as different kinds of relationships. This chapter explores such relationships from neurological, psychological, anthropological and communicative perspectives, focusing respectively on synapse connections, object relations, artefacts and language. The rationale for this exploration is to identify the specific understandings of exclusion and inclusion afforded by these particular constructions of relationships.

This identification is illustrated by selected excerpts from an extended narrative by Nanna, a Danish woman with special educational needs. Nanna's experiences of educational fringe dwelling are analysed through the four relationship lenses highlighted above. In doing so, the chapter

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demonstrates the empowering potential of narrative as a research method that can contribute directly to building resilience and enhancing equity in educational settings.

Keywords Exclusion • Marginalisation • Narratives • Relationships • Special educational needs

Introduction

The overall setup in educational research should involve the link between the individual experience and the societal impact. The significance of events in our schooling for societal challenges, such as inclusion in education, is not new to research, but remains underexamined. Kindergarten and school could be called the hurricane's eye where this exchange is taking place. By contrast, we at the welfare institutional level have a mediator exemplified by, for example, the teacher or the pedagogue. These welfare professions will always, voluntarily or not, to some extent take the role of "the significant other". This position is doublesided, considering that sometimes a professional is the facilitator for processes like learning and wellbeing, but in other situations is causing conflict—fight and flight owing to bad relations, bad decisions, poor supervision or simple neglect. This position could also be applied to adults or children who from varied perspectives can be considered educational border crossers.

The turning point for success or failure or for human growth or human conflict pivots on the degree to which the individual perspective and the societal perspective are brought to the fore. In other words, the focus here is on investigating the connection between "the big narrative", in the form of institutions, such as school that is personified by the teacher, and "the little narrative" in the form of the individual's life, as this manifests itself in the personal biography or narrative. It is in the meeting of these narratives that researchers become aware of the impact of childhood experiences of marginalisation and exclusion in mainstream classes, special education or elsewhere, and of how an adult must try to make meaning in her or his life trajectory. Focusing on the meeting between the big

narrative and the small narrative becomes an important theme, as this meeting is about relationships between children and professionals from both a general perspective and a special educational needs perspective. These special needs children as students are located in an exposed and marginalised position. With this double perspective, inclusive special educational needs represent both an individual dimension and a relational dimension. This is a perspective that Tetler (2002, 2011) emphasised as a productively outset for school practice (Quvang, 2017).

Relationships, and how these relationships are told as adult narratives about school and special educational needs, are the focus of this chapter. To illustrate the connection between relationships and marginalisation, a perspective narrated by Nanna, a 33-year-old woman, is used to exemplify how she experienced being referred to special educational needs and her resultant educational exclusion (Quvang, 2010). Furthermore, this narrative perspective demonstrates one approach to communicating and articulating specific voices when researching within the educational margins.

This analysis is carried out against the backdrop of a heightened interest in our narratives, life stories and biographies signifying the special quality of the human world. More specifically, it is essential to understand the qualities of the connection between childhood and adulthood because it is a banal truth that all adults carry and show significant parts of our childhood for good or bad. We can deal with this situation only by finding actively and consciously meaning and significance in the contexts that may or may not be. Theoretical understanding is therefore rooted primarily in psychological theory, recognising the great and complex importance of childhood to human needs, emotions, fantasies, unconscious and conscious wishes, choices and self-understandings throughout life. Working with narratives to achieve meaningful knowledge can be achieved in many ways.

In this chapter, the narrative method is linked with the understanding that, as a researcher or as an educator, when working with narratives, one must also involve oneself. This is necessary because the analysis of the lived lives of others will be interpreted in a narrative that invariably includes one's own experiences, feelings and so on. Therefore working with narratives should be understood as a mutually influential process

between the researcher's *self* and the narrator's or the respondent's *biography* or narrative written and understood as working with self/biographies. This renders the research a relational and cooperative process. To work with one's own narrative is particularly relevant for locating one's own teacher or researcher "blind spots", especially if one's own experience has included exclusion.

This chapter is based on the reasonable and evident assumption of the importance of the crucial connection between the individually perceived experience and the societal significance thereof, such as what it means to society when an adult as a child in school has been in an exposed position/with special needs and in obvious danger of being marginalised. At the same time, the premise is such that the relationship is created in the meeting between the professional and the individual child. Hence the thematic focus in this chapter—empirically and theoretically—is on building relationships, but also on establishing the foundations for moving beyond marginalisation. More specifically, the discussion in the chapter is clustered around the following four sections:

- Relationships from a neurological perspective, focusing on synapse connections.
- Relationships from a psychological perspective, focusing on object relations.
- Relationships from an anthropological perspective, focusing on artefacts.
- Relationships from a communicative perspective, focusing on language.

As is documented in the narrative analysis below, the educational community plays a defining role in creating and reinforcing marginalisation, but at the same time this community contains persons, powers and possibilities for preventing, challenging and overcoming such marginalisation.

Relations from a Neurological Perspective, Focusing on Synapse Connections

Current research documents that neurological processes in the brain are of crucial importance to human development and relationships. Early research focused on the "mechanics" in the dysfunctions of the human brain, whereas modern neurological research represents a paradigm shift. This change focuses on the importance of the brain being embedded in—and connected with—social processes with other people, and on the discovery of understanding the brain's capacity for human development (Cozolino, 2006; Damasio, 2004; Horsdal, 2008; Siegel, 2002).

Synthesising key elements of this research, Damasio (2004) noted:

> When we talk about the shaping of a person through education and culture, we refer to the total contributions from (1) genetically transmitted traits and dispositions, (2) dispositions acquired early in the development under the dual influence of the genes and the environment and (3) unique personal episodes, which are experienced in the shadow of the first two, deposited and continuously classified in the autobiographical memory. (p. 227)

From this perspective, human development is a complex pattern of processes at many levels that must interfere with creating and supporting optimal frameworks for both individual and community development. This is where recent research points to the importance of social synapses, which are the result of experiences of human interaction of all kinds. Human evolution of mirror neurons, which are activated as neuron fires, occurs when human relationships become meaningful and intense, and when the significant other in school is a friend, mentor, educator, teacher or other. Research demonstrates that we can build relationships of different qualities that can be characterised as being among other things loving, ambivalent, repulsive and so on. This also makes it clear that in communities of practice, like school, there will be relationships that form the basis for inclusive and exclusionary processes. A significant factor relates to the particular circumstances that apply when the inclusion and exclusion theme is applied in a special educational needs context. It is

here that these concepts can be said to have a double dimension: being in an exposed position/with special needs is already challenging (Quvang, 2017). In this marginalised position and setting, processes and persons are crucial for finding meaning in flight or fight and hence self-exclusion or inclusive agency, as is shown below.

Relationships, Synapses and Special Education

To be referred to special educational needs support is potentially a help, with the golden opportunity to learn more and better. Viewed retrospectively from an adult perspective, however, it is also an event and a shift that give rise to reflections. Of course, this adult must try to find the meaning of what happened in the wake of this change to understand the connection with other relationships in life. In this case, initially, and as the preliminary comment in the narrative, the narrator reflected on factors that may contain causes of being marginalised in school, and furthermore several aspects associated with synapse connections were touched on:

> I've thought a lot about why I'm dyslexic. Because you want to find an explanation. Now, when my little sister isn't dyslexic, I have not been able to find the whole explanation of why I am, because there are many explanations that can be recorded. I've been reading and reading about someone born prematurely. I myself have been born a month and a half too early. Because they are born too early, they may be word blind. And, since both my parents smoke like chimneys, that may be the reason for it. But that's not possible. (Nanna)

Later in Nanna's narrative she told about the relationships that, from her experience as a child, now interpreted from an adult perspective, once were, and now are, very important for maintaining relationships while creating new ones in new contexts:

> We were seven or eight [children] of different ages. I went with two Down Syndrome [children] and others with various and difficult problems. My old class would not talk to me any more. I was invisible if I met them at the

hallway and said, "Hello". I also learned to be invisible [in order] not to be harassed. If you said something, you could easily be harassed. (Nanna)

With these narrative fragments, some of the massive challenges being at the educational crossroads between different organisational forms and communities of practice, in relation to associating with other peers, with some of them perhaps different from one's own, were emphasised. Furthermore, the opportunities to associate with adult educators and teachers were challenged. This complicated the activation of social synapses and the exchange of mirror neurons, which are so important for establishing and developing social, emotional and cognitive competencies and routines counteracting marginalisation. In other words, this exposed and excluded position can create additional barriers to the basic inclusion in communities of practice. Thus, possibilities for being marginalised applied also to Nanna.

Relationships from a Psychological Perspective, Focusing on Object Relations

We are all people with an identity and a self, just as we all form part of "settings" as families, classes and teams not only where we are ourselves but also where we as subjects also represent objects for others like siblings, comrades and fellow players. We meet these people as the significant other, because these, as object relations with their own personalities, relationships, language and mirroring of emotions, affect our own self-understanding. This is well-documented in various psychological paradigms, and is now also supported by the latest neuropsychology, as was mentioned above, and supported with the term "social synapses". Cozolino (2006) introduced the original perspective that we, through neurons and processes at a synaptic level, mirror and are being mirrored in the relationships with our fellow human beings, thereby creating experiences that are structured and remembered in the brain. Cozolino concluded, "There are no single brains". Hence, activity in synapses becomes crucial—for instance, in relation to our learning that occurs in social

processes, among other things, by activating mirror neurons in relationships with others. This occurs in the relationships initially between children and their parents, later between children and their teachers and so on. It is in these object relationships that people's feelings arise and unfold and mutually affect one another so that, with reference to Cozolino, we could say, "There are no single emotions". At school, this becomes evident in the object relationships that may contain both a negative and a positive nature, and perhaps especially for students in exposed positions/with special needs this may be significant. There are fragments from this process that become both our identity and the narratives that we tell ourselves and others to find meaning and coherence in our lives. It is from these deeply stored and layered memory tracks that we think and act from an episodic, here and now perspective. Moreover, everyone finds that this episodic memory can save significant experiences that can be crucial to our understanding of life and existence. This scenario applied also to Nanna, as we shall see.

Relationships, Object Relations and Special Education

In Nanna's narrative about schooldays way back then, now narrated from the perspective of being 33 years of age, there was a strong focus on the importance and quality of object relations and on the sensitivity relating to Nanna's self-perception and identity. After narrating what it felt like in the first place to attend ordinary class and later to be referred to special educational needs and to experiencing enforced relationships with other students in these contexts, Nanna directed the focus of her narrative towards the dynamics that, in the form of object relations, became crucial for Nanna's self-perception and identity. This happens based on comprehensive bullying, being one of the most common, but also most penetrating, ways of experiencing marginalisation, which is a challenging condition for many students in exposed positions/with special needs:

> I avoided bullying by being invisible while others from the class were bullied because they were called and yelled at. But, in a way, I was also bullied; it was psychic that they overlooked me and did not greet me in the hallway.

If I should give examples of how I wasn't allowed to transform myself—. When I got home after having gone to school and I went to town with my girlfriend from the after school, I realised that two boys from my old class, the mainstream class, could not recognise me. And they tried to befriend me in a loveable way. I knew them well. So, when I told them who I was, one of them said; "You've really changed a lot". Here I will touch this with the surroundings and the others, because I have not changed a bit myself. It is in the surroundings. Because I have not changed myself. I have just never been allowed to be the one I am. (Nanna)

Related to both the process of learning and the teacher as the significant other, Nanna's narrative contained more interesting self-reflections, where she narrated how reading lessons for her were a nightmare. She narrated how, when she was babysitting, based on her own bad experience, she implemented homework for the children of whom she was taking care in a completely different way from what she had experienced herself in school and at home. In this excerpt from the narrative, there was finally a brief but nevertheless striking example of how a teacher can become the significant other and a role model. From this position, it is perhaps possible to prevent marginalisation:

Instead I started playing with that girl. For example, playing with phrases that rhymed and I let her draw and tell stories. And so it also did well for her to know that I wasn't "Clever—Trevor", and in fact couldn't read very well, but that we had to find a dictionary together to sort things out. In my own school time, I remember, when I went to special educational needs, a teacher who kept saying that I was not dyslexic. And, during that period, I made a huge leap in my learning. And I think it was because I was not placed in a booth by this teacher. (Nanna)

Relationships from an Anthropological Perspective, Focusing on Artefacts

Relationships are not just something that we have with other people or with agents in the communities of practice and thus embedded in human relationships. As agents in school, all children and adults meet and

collaborate on activities in the form of play and learning and so on, about the common third in a scheduled weekday with a wide range of materials in classrooms, books, pictures, boards and iPads, and the physical frames in the form of tables, chairs, groups, classrooms, common areas and so on. From anthropology, we know that this affluent world in terms of artefacts and architecture is of great importance to our experiences and frameworks for learning and wellbeing, and therefore we also develop all relationships with the artefacts of this world of things and structures. Artefacts help to structure the school's activities with a significant focus on learning, and these frames are usually set by individuals other than the agents like the students and the teachers themselves (Schein, 2000). On the other hand, artefacts of any kind in school can be the very reason for marginalisation, whether it be materials that exclude participation, school yards with dangerous spots for bullying, classrooms arranged for gifted students and so on. Thus, artefacts and architecture with the school's scheduled structure, interior design and thus the school's functionality and the framework for learning contribute to the perhaps more important "hidden learning", including terror for some students. Artefacts and architecture are the tangible world, structures and spatial environments in which children and adults as agents are developing relationships through each school day and throughout years of schooling. One can find many examples in Nanna's narrative that confirm that these relationships are important for experiences of marginalisation, and for how these occur in the episodic memory many years after school has been completed.

Relationships, Artefacts and Special Education

What Nanna, as the adult narrator, tries to understand and make sense of in the context of why she ended up being marginalised relates to many aspects, but also to experiences related to artefacts and architecture. From getting around in the schoolyard and buildings, and finally finding the right place and getting there on time, she felt exposed. At last she ended up in a classroom where there was a blank space for her. This can perhaps be of help to understand and explain the experience of how exclusionary processes can be a start of experiencing marginalisation. That such subtle processes happen, even before teaching and other activities begin at all, was illustrated starkly in Nanna's narrative:

The school where I should start was my dad's old school. So he knew exactly where the classroom was. But there had been a lot of change since then. A new building for small children was built. So we went into a classroom for a sixth grade or something. At least there were some big children. I came too late into my class that first day of school. We had to go to another building. And, as they all knew each other in my class because they had gone to kindergarten together, they already had sat down. All the girls sat together two by two. And all the boys were together two by two. Except a boy I was placed next to. Then we were teased as being in love. (Nanna)

The schools artefacts and architecture exemplified above pointed to the formal learning requirements that are the DNA for any school. However, for students in exposed positions/with special needs, there may be other qualities and opportunities for learning—for instance, in a homelier environment. Any kind of teaching, including being excluded from using the same materials as the others in the class, and being excluded from the community of practice in which one would like to be included, can create resilience and shift the focus to opportunities for participation in other, apparently more interesting communities that may also contain other opportunities for learning:

When I got home from school, my mother would help me with homework. I hated it. My little sister, who is four years younger than me, managed the stuff. I threw away the school bag or forgot it. I spent all my spare time being with the animals or with the neighbouring boys. It was a wonderful time. We made rafts with a cabin, built soap box cars, built caves, and had a great time. (Nanna)

For a student like Nanna, the school can thus become a challenging and uncertain place, where everyday routines of entering and maintaining relationships are challenged by other agents, artefacts and architecture. This social, physical and structural framework contributes to our narratives and self-understanding while we are going to school, but also when as adults we look back and try to understand and find meaning in why what happened when.

Relationships from a Communicative Perspective, Focusing on Language

When we enter one another's relationships, as was stated above, it is because we communicate. When we communicate, we do it with our analogue language in the form of body language, mimicry, gestures and so on, and also with our digital language, which is spoken and written language. Communication takes place in real time here and now and electronically—for example, on social media detached and displaced from here and now. We use "external speech" when communicating in dialogues, and a parallel to this is "internal speech" in the form of monologues, where we ourselves reflect and relate to the context of the current communications and relationships surrounding us. This parallel process is central to connecting, maintaining and developing meaningful relations and identities. This is happening in a fragmentary way from a here and now perspective where a life story, a biography or a narrative strives to become a coherent, meaningful history of what, when, how and perhaps why. The narrative is thus a "put into language" of self, identity and changeability, as the narrator understands and finds meaning, built around a particular plot. To narrate is not just something that one by nature necessarily can or does, and for some it will be associated with difficulties owing to several reasons such as a lack of linguistic competence, a lack of knowledge about important relationships in one's life and so on. That is why there is a strong reason for using the narrative as a way of strengthening learning, learning by doing and remembering in the field of special educational needs in the process of supporting students in exposed positions/with special needs. Or, as Horsdal (2008) wrote in her thesis about narrative work:

> Learning to be able to learn, to learn to remember, to learn to learn and, above all, to learn to be understood as the acquisition of the narrative skills necessary for the ongoing identity work in a changeable and interchangeable world is, as evidenced by this thesis, not something that comes only by itself through the genetic equipment or cognitive development or maturation. … There is therefore a great need to investigate and explore communicative interactions, especially in the professional contexts that take care of development and learning. (p. 217)

With this focus, the "big" and the "small" narratives will be connected (Quvang, 2010). In this way, the chances of detecting marginalisation related to persons and processes, and hence of revealing possibilities for fighting these negative dynamics, are enhanced.

Relations, Language and Special Education

In Nanna's narrative, there were many examples where she used language to reconfigure the story of her life, and thus also her understanding of several incidents in her life. Accordingly, there is no doubt that this awareness, and this simultaneous linguistic interpretation, were associated with pain and challenges of a different nature, as it appeared that these retrospective memories were caused partly by a current imminent examination, and partly also by having to relate to the "disturbance" that having told her narrative and subsequently reading it had generated for her:

> At the same time as, after talking with you, there are so many things that have been opened, where I think, "Has it really been that bad?". And then I wonder if I can finish it here, or if I want to dump the exam? … I can feel it has meant something. I cannot say exactly what. But my mood has changed a lot since. I'm annoyed, for example, that one of the others in the groupwork so easily can write anything on the computer. I have not thought about it before, but I've realised that it's not over yet. There's a lot to learn yet. (Nanna)

With this almost self-therapeutic inner monologue, Nanna positioned herself as a narrator or a protagonist against several antagonists in herself, but also in others who represented resistance and what she had been "fighting" against in her life with the experience of being marginalised and with her persistent attempts to be included. As was apparent from the narrative, Nanna was proud to be in a continuous process of developing and adapting self-understanding, and thus of identifying the changing and challenging circumstances of her life. These perspectives with the two voices—Nanna as the protagonist, in opposition to the other antagonists—were further elucidated in this sequence from the narrative, which demonstrated ambivalence and vulnerability, but which also indicated resilience:

If I have to say that, I may feel discarded. And well, I've worked my way up. But there is some bitterness. I think it's because the others, or some types, have always wished to alert me that I had some problems. And then I would like to say, "That I've reached longer than you". It is not because there is no justice at all. Why have I continued despite all this? I think it has something to do with my boyfriend, who has continued to say that it is important to get a good education. It is his entire family who has this view on education as important, that it is important for all people. And it has supported me with his network. I've always thought I had a perfect childhood. When I read my story, I thought, "Such a story with school and so on". (Nanna)

This leads to the second last quotation from Nanna, which very briefly but precisely summarised the plot in the narrative, and thus the focal point of Nanna's understanding of her life with her many experiences of marginalisation, and with her ongoing desire to be included again and again. The plot in her narrative was exactly the struggle to be included when, from an exposed position/with special needs, she had to take up the struggle with her surroundings, and not least with herself, to reach her goal, and that battle never seemed to stop:

You may be a little jealous of others but, when you see their quality of life, I will not change. Then my aunt recently said that it was a shame for me that I never could go the easy way around, but that I should always had to fight for anything, but I just would not listen to that. Because I believe, when I stand with my diploma, I will be very proud of myself, and it's good, because you will not get everything delivered for free or on a silver plate in your life. (Nanna)

Conclusion

With this narrative about school told from an adult perspective about the experience of being marginalised in school, and constantly struggling to be included, from the perspective of a focus on relationship as concept and practice, a number of connections between the individual experience and the social impact have been documented. The educational border

crossing exemplified here was summarised in the narrative of Nanna herself in this way:

> I've gotten stronger because I've been successful. I have shown the others that I could, when the others thought I could not. Because, every time I win, I get the taste of blood on my teeth. And because I'm a positive person and I can see the positive in everything, and that's my luck, I'll just go on and on. I'm always attending the annual "old student day" at the boarding school, and the teachers there cannot understand that I'm almost educated as a bachelor in pedagogy. "We understood you would not give up. But that you have come so far for that we are proud", they say. But I am myself too. (Nanna)

Saying goodbye to Nanna with thoughts and gratitude for giving us her narrative, our focus shifts to a summary of the relationships derived from the four presented theoretical themes analysed above:

- Relationships relate to all aspects of human life from a neurological to a sociological perspective.
- Relationships concern the experience of belonging and participation in dyads and communities of practice.
- Relationships relate to the tangible world's functionality and aesthetics in the form of artefacts and architecture.
- Relationships relate to the ways in which language and communication help to define power and normality.

In all four of the aforementioned facets of relationships, welfare professions in the area of working with learning and wellbeing for children and youth have an important formal and conventional role as educators, teachers and so on contributing to and promoting inclusion, and also counteracting exclusion and marginalisation. This inevitably implies that these professions must bring themselves into play in the fields of the general and specialist pedagogical contexts of this task. Solving the task challenges the professional understandings of these professions, but also a number of ethical considerations for the professions on aspects that promote fairness or equity in educational contexts must be taken into

account (Artiles et al., 2015; Baltzer & Tetler, 2000; Tetler, 2002, 2011). With these final words, the road should be paved for the further immersion in and development of our practice and theorising when researching within these particular educational margins.

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8

Embracing the Ethical Possibilities of Researching About Autistic Individuals' Transition to Post-School Opportunities in South West Queensland, Australia

Karen Glasby

Abstract This chapter elaborates the ethical challenges and possibilities arising from a qualitative case study to engage young autistic adults about secondary school transition practices that support a positive post-school quality of life. The challenges arise from the need to work *within the parameters* of the ethical conduct in research outlined in the Australian National Statement of Ethical Conduct in Human Research (NHMRC, *National statement on ethical conduct in human research*. Canberra: Australian Government. Retrieved from https://www.nhmrc.gov.au/about-us/publications/national-statement-ethical-conduct-human-research-2007-updated-2018#block-views-block-file-attachments-content-block-1, 2007 [updated 2018]), while also addressing the individual

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research participants' strengths and needs with regards to agency, capacity and voice. A range of strategies designed to optimise strengths and minimise potential risks for participants, while addressing benefit, risk and consent, is presented.

Introduction

This chapter addresses the challenges faced when attempting to obtain ethical clearance for the research study "Self-determination for the Rest of My Life: Young Autistic Adults' Insights into the Interaction Between Queensland Secondary School Transition Practices and Post-School Quality of Life". Specifically, the question of why and how autistic people came to be marginalised within education and educational research is examined. The chapter then considers the impact that this has for autistic people and the autistic community in relation to their participation in research. Finally, effective and innovative strategies that the researcher employed whilst addressing these issues are examined.

Autism spectrum disorder (ASD) is a condition in which individuals display differences in how they engage in social communication. Rigid and repetitive interests and behaviours are also exhibited (American Psychiatric Association, 2013). Contemporary understandings recognise one condition, autism spectrum disorder, with a strong emphasis on acknowledging the wide spectrum and levels of differences each individual experiences, and the supports required by each (DSM 5, 2013; Vaccaro, Kimball, Wells, & Ostiguy, 2015). Thus, the use of the umbrella term "autism" throughout the chapter is utilised, whilst acknowledging the significant variation that exists between individuals with the same diagnosis.

The researcher has both a personal and professional interest in this topic, as both the parent of a young autistic adult and an educator who has worked for many years supporting autistic people within the

Queensland education system in Australia. Both experiences have shown that education can, and often does, function as an agent of marginalisation for people with autism. Research supports this experience, finding that the majority of individuals with autism experience poor academic and social outcomes throughout school and poor post-school outcomes as they transition from school to adult life (Hume, Boyd, Hamm, & Kurcharczyk, 2014). Conversely, the researcher posits that education and educational research can act as a means of empowerment for the autistic individual, their family and their community. However, to achieve this outcome, research must avoid replicating the marginalisation that currently exists within education and educational research. Rather it must identify and challenge inequities, and offer innovative methods for conducting inclusive research.

Situating the research project within a bio-psycho-social model of disability (Convention on the Rights of the Person with Disability [CRPD], 2006) reinforces the importance of educational research as an avenue for empowerment for people with autism. On the other hand, it also leads to the primary underlying wicked problem faced in obtaining ethics approval for the research project, acknowledging impairment and difference. Paradoxically, this acceptance of impairment and difference, in and of itself, propagates marginalisation (Vaccaro et al., 2015). Marginalisation exists when an individual or group are not considered a part of dominant mainstream society. Thus, this recognition of the differences in the way autistic individuals experience the world, communicate and behave, automatically positions the autistic individual "outside" the mainstream.

Many people in the autistic community contest this ideological basis of their marginalisation and positioning by denying that their difference implies impairment. By moving away from a deficit-based neurobiological discourse about autism to emphasise the concept of neurodiversity, the autistic community suggest that their experiences are seen as just one of the many variations of the ways in which human beings experience life (O'Dell, Bertilsdotter Rosqvist, Ortega, Brownlow, & Orsini, 2016). Within this understanding, how the person experiences the world, communicates and behaves is valuable to the individual, and the fact that others may struggle to interpret this does not detract from this value (O'Dell et al., 2016). While in principal this conceptual shift appears to

challenge the marginalisation experienced by the autistic community, and therefore should be supported within educational research, the process of obtaining ethical clearance for research with autistic individuals does not easily conform to this conceptual understanding (Short et al., 2017; Souto-Manning & Winn, 2017).

Issues Around Obtaining Ethical Approval

Obtaining ethical approval for research conducted with human participants is the process of involving other researchers in reviewing and adjusting the proposed research to ensure that the values and principles of respect, research merit and integrity, justice and beneficence are enacted for those who participate in research (NHMRC, 2007 [updated 2018]). The importance of upholding these values, particularly for marginalised research participants, cannot be denied. Nevertheless, this very protection creates the wicked problem of not conforming to the conceptual understanding of neurodiversity (Midgley, Davies, Oliver, & Danaher, 2014). As discussed above, neurodiversity implies that the condition of ASD should not be labelled as medically and functionally inferior to the "norm", and therefore should not be placed under the label of "cognitive impairment, intellectual disability or mental illness" as used with the National Statement on Ethical Conduct in Human Research (NHMRC, 2007 [updated 2018], p. 73). Yet, in order to obtain ethical approval to conduct research with autistic participants, the researcher is required to identify the participants as fitting within the bounds of this group. Furthermore, there is little to no recognition within the National Statement of Ethical Conduct in Human Research (2007 [updated 2018]) that ASD as a condition exists separately to the listed conditions, that the implications of the condition can be significantly different or that the benefits and risks may be different again from other marginalised groups of people with disability.

The value of respect for human beings is central to the National Statement on Ethical Conduct in Human Research and is defined as the "recognition of their intrinsic value" (2007 [updated 2018], p. 11). Underlying principles of respect includes due regard for the welfare,

beliefs, perceptions, customs and cultural knowledge of all participants. The use of the terms "human beings" and "all" within this definition implies the inclusion of marginalised groups, including autistic people. As stated by Milton (2014), despite their differences autistic people remain human, and as such, should be afforded the same value as all human beings. Furthermore, the ideological underpinning of the intrinsic value of people with disability is strongly promoted throughout Australian society through the Convention on the rights of people with disabilities (CRPD) to which Australia is a signatory. Article 17 of the CRPD states that "Every person with disabilities has a right to respect for his or her physical and mental integrity on an equal basis with others" (2006, p. 13). Thus the value of respect afforded to all human beings, across all areas of life, must be applied to autistic people to the same level as for every other citizen, including as participants within research.

Articulating and Communicating the Voices of Autistic Individuals

Despite these key documents supporting educational research with people with disability promoting the value of respect for people with disability, autistic people have had few opportunities to participate in research examining issues related directly to their own experiences or the wider experiences of the autistic community (Cook-Sather, 2014; DePape & Lindsay, 2016; Tesfaye et al., 2019). Rather, there is a significant amount of research pertaining to the education of individuals with autism, which comes from the perspective of parents, siblings, teachers, health care and support providers, while the voices of individuals with ASD remain largely uncaptured (DePape & Lindsay, 2016). The result of this is that the disability discourse focus remains on those who belong to the collective "in" group, and the inequities and marginalisation of autistic people remain unchallenged (Wollbring & Burke, 2013).

   Bringing the value of respect, and therefore inclusion, of people with autism to educational research requires all researchers to recognise the difference and diversity in terms of needs and support of this

marginalised group, without taking a deficit-based view of the individual's capacity. A deficit-based view indicates that the capacity of autistic individuals is seen as "less than" the capacity of non-autistic, non-disabled individuals. Within this understanding, the capacity to understand information, sequence events, recall experiences and express subjective understandings remains in question, especially for those who have higher support needs (Tozer, Atkin, & Wenham, 2013). Including autistic individuals in research challenges these deep-seated assumptions about capacity (Cook-Sather, 2014) and supports the view that they can be involved in their own lives, make decisions, influence supports and challenge policy.

Literature is beginning to support this understanding, with a small number of studies finding people with ASD are able to accurately identify and communicate their ideas, feelings and experiences. Furthermore, this research also indicates that autistic individuals use different perceptions or world views than non-autistic people (Clark et al., 2015). These findings support the view that knowledge is not universal and needs to be considered within the specific context of the individual (Couch, Durant, & Hill, 2014). As such, specific, distinctive knowledge can be found in the autistic community. Unfortunately, the ability to contribute to the construction of this knowledge is impeded by a "disconnect" in the ways in which autistic people communicate knowledge, and the ways in which researchers collect knowledge (Milton, 2014).

Respect for the autistic community, their value and their ability to construct knowledge in and about themselves necessitates researchers to find effective ways of eliciting and sharing this knowledge (Milton, 2014). To do this it is suggested that researchers maintain a situated stance of universal design in the construction and implementation of research projects (Vaccaro et al., 2015). Universal design includes, from the outset, flexibility, adaptability and multifaceted approaches that ensure everyone, including people with disability, can access and participate in research. Routine research design practice that involves the principles of universal design would seem to offer significant opportunity for the inclusion of marginalised participants in research without replicating the dualism of "us and them" that exists within the current retrofitting of research practices to support the inclusion of people with disability (Vaccaro et al., 2015).

Universal design is particularly relevant when considering the goal of giving voice to autistic individuals through research participation. There is significant recognition of the difficulties in eliciting the voice of marginalised populations throughout research (Cook-Sather, 2014; Midgley et al., 2014; Souto-Manning & Winn, 2017) and in particular eliciting the voice of people with disability, including those with autism (Milton, 2014; O'Dell et al., 2016; Tesfaye et al., 2019; Vaccaro et al., 2015). Considering voice in relation to autistic people presents both figurative and literal wicked problems for researchers. The voice of autistic people has not been well represented through research as a result of the marginalisation experienced by this group in relation to participation in research. Additionally, the voice of autistic people, even when they are included as research participants, is difficult to capture because autistic people, as a primary characteristic of the way they function, experience significant differences in the way they interact and communicate with others (DSM 5, 2013; Loyd, 2012). As most research is typically based on verbal or written skills, this prevents individuals who do not communicate in these ways from sharing their voice through research (Tozer et al., 2013). Thus, the question presented by Dervin (2014, p. viii), "In what language are people 'doing' voice and what impacts does this have on what they say?", becomes a paramount consideration when researching with people with autism.

People with autism do not speak with one voice, rather presenting with a range of communication styles, experiences and preferences (O'Dell et al., 2016; Tozer et al., 2013). Thus, universal design strategies when considering voice must provide for a diverse range of suitable communication methods. These communication methods should include the possibility for participants to use verbal language, simplified language, written language, pictures/visuals, sign language or a combination of any of these methods. Furthermore, the social expectations of communicating with participants with autism must be considered. The researcher may need to provide additional processing time, re-word questions and use shorter, easier response questions, consider the use of literal language, the tone and volume of language used and ensure non-verbal communication strategies used throughout the research process, such as the use of direct eye contact, are suitable for the participant being interviewed.

These strategies relating to both receptive and expressive communication differences can, and should, be woven into all aspects of the research design.

Benefit and Risk for Autistic Individuals

Beneficence, as identified in the National Statement on Ethical Conduct in Human Research (2007 [updated 2018], p. 10), is the concept that "the likely benefit of the research must justify any risks of harm or discomfort to participants". Within this concept of beneficence are the two constructs of benefit and risk. Benefit is defined as a "gain in knowledge, insight and understanding, improved social welfare and individual well-being, and gains in skill or expertise for individual researchers, teams or institutions" (NHMRC, 2007 [updated 2018], p. 14). While risk is defined as "a potential for harm, discomfort or inconvenience" (NHMRC, 2007 [updated 2018], p. 12). Both constructs must be applied to individual research projects to gauge whether the overall concept of beneficence is achieved.

Research conducted with human participants must be justifiable by its potential benefit. That is, the likely benefit of the research must justify the risks of harm or discomfort to participants (NHMRC, 2007 [updated 2018], p. 73). Implicit in the consideration of benefit is the understanding that participating in research will provide the participant, and the wider community, with increased levels of knowledge, improved practice, skill and awareness (Short et al., 2017). These benefits have been widely recognised for the community who live and work with people with ASD; however, there has been a lack of recognition of the benefits for autistic people themselves. The underlying characteristics of autistic individuals are seen as incompatible with improved outcomes through research participation (Milton, 2014). This understanding is being redressed with contemporary findings of research supporting the benefits for marginalised people, including those with autism (DePape & Lindsay, 2016; Loyd, 2012; Tesfaye et al., 2019; Tozer et al., 2013).

When the construct of risk is applied to autistic individuals, there needs to be a recognition that these individuals are "more than usually vulnerable to various forms of discomfort and stress" (NHMRC, 2007

[updated 2018], p. 73). Anxiety is considered to be inherent to a diagnosis of ASD with at least 40% of all individuals with ASD experiencing clinically elevated levels of anxiety (van Steensel, Bogel, & Perrin, 2011). This increased risk of anxiety for autistic individuals results in the identified increased risk of discomfort and/or stress for autistic individuals when participating in research, particularly if this research requires them to engage in complex social communication, such as interviews (Danker, Strnadova, & Cumming, 2019; Tozer et al., 2013). As suggested by Midgley et al. (2014), it can be this increased risk of harm experienced by marginalised groups and the focus of ethics committees on the construct of "do no harm" that may actually discourage researchers from engaging in research with these groups. In the case of research with autistic participants, this is a significant difficulty (Milton, 2014; O'Dell et al., 2016).

When considering the risk of participation in research, it is important to acknowledge different forms of risk and the implication of harm across time and contexts. Thus, researchers need to consider the short-term harm of increased levels of anxiety for the individual, versus the long-term harm of not allowing the person with autism to influence their own, and others, future. This construct of risk for people with disability must be considered within the human dignity of risk (Perske, 1972). Dignity of risk is the awareness that self-determination and the right to take reasonable risks are essential for human dignity and self-esteem. This right to human dignity should not be impeded by excessively cautious or overprotective policies or practices. Dignity of risk is supported in the Convention on the Rights of Persons with Disability (2006) where the rights of people with disability to make their own choices and be actively involved in decision-making processes for and about themselves are expected. Thus, the consideration of risk for autistic people participating in research again presents the wicked problem of recognising the potential for elevated risk, while at the same time not allowing this elevated risk to prevent the individual from choosing to participate in research and face the possibility of experiencing anxiety.

To address this situation, it is recommended that researchers employ universal design throughout the research design to both minimise and manage this risk of increased anxiety throughout the research process (NHMRC, 2007 [updated 2018]). Universal design strategies for research

provide a sliding scale of support, as required by the individual, along with participant choice regarding their involvement (Danker et al., 2019). Strategies suggested for the current research project include participant choice on the number and length of interviews, as well as a choice of place and time of interviews. Choice will also be provided on how interviews are to be conducted, either face to face, online or via phone or written interviews. Additionally, participants will be offered a choice of communication methods, verbal, written, photographic, pictorial or a mix of communication options so that preferred communication styles of the individual can be used during interviews (Loyd, 2012; Tesfaye et al., 2019; Tozer et al., 2013). Participants will also be invited to spend time getting to know the researcher prior to engaging in the interviews with the hope of developing a positive relationship between the participant and researcher before the research is started. This opportunity to develop a positive relationship is suggested to support effective communication during the research process (Couch et al., 2014; Loyd, 2012; Tesfaye et al., 2019).

A final and critical strategy in addressing risk is the option for the participant to nominate an advocate who will work with the researcher to impart knowledge about the participant and how they can best be supported to reduce risk and engage effectively throughout the research process. The advocate will be a person who is over 18 and able to give consent. The advocate is someone who knows the person with autism well, and is willing and able to advocate for the participant throughout the research process, ensuring the participant's choices are implemented, and the risk of increased anxiety or distress is reduced. The role of the advocate will be to liaise with the researcher from the beginning of the research process to share their knowledge about the autistic individual's preferred communication methods and to ensure the researcher is aware of, and monitors for, signs that the participant may be experiencing elevated levels of stress during an interview. The use of support people who are familiar with the autistic individual is strongly recommended throughout literature on researching with the autistic community (Loyd, 2012; Milton, 2014; Tesfaye et al., 2019; Tozer et al., 2013).

Consent by Autistic Individuals

Universal design strategies to support communication differences also provide significant benefits in meeting the requirement of consent necessary to obtain ethics approval. In the National Statement on Ethical Conduct in Human Research (NHMRC, 2007 [updated 2018]), the requirement of consent implies that participants will exercise the right of voluntary choice with regards to participating in a research project, and that this choice will be based on sufficient information and an adequate understanding of the research and the implications of participation. The deficit-based model of disability reinforces underlying assumptions that the autistic individual would not understand the information provided, nor what will be expected of them during the research or the possible implications of this. As a result, it was deemed by many that a person with autism was not capable of providing informed consent to participate in research. Alternatively, a strengths-based approach that sits within the bio-psycho-social model of disability recognises the potential difficulties associated with the effective communication of information, while at the same time, acknowledging that the provision of the information in a format that is relevant, easily accessible and well supported ensures the individual is able to provide informed consent (Loyd, 2012).

Strategies specific to the provision of informed consent again provide a range of options to address the diverse capacity of autistic individuals. These options range from written consent forms for young adults over the age of 18 who are able to provide consent to verbal assent that will be re-negotiated with the participant after consent is obtained from the young adult's legal guardian or carer (Loyd, 2012; NHMRC, 2007 [updated 2018]). All documents related to informed consent, including consent forms, assent forms and participant information sheets, are made available in a range of formats including audio recordings, written documents and documents using visual or pictorial information. Consent, or assent, depending on the context can be provided through either written, verbal or non-verbal agreement (NHMRC, 2007 [updated 2018]).

A key strategy employed in the stated research project is the co-construction of the participant information sheet involving the researcher,

the participant and their advocate. The participant information sheet is the means by which the researcher provides information about the research project, and the ways in which the participant will be involved, including the benefits and risks of participation (NHMRC, 2007 [updated 2018]). Given the underlying basis of working with each participant to adopt strategies to support their participation, the provision of a single information sheet was not appropriate. Rather, an outline of the research project that allowed for the inclusion of strategies specific to the individual was deemed as more appropriate, and more likely to meet the principles of universal design. Thus, prior to collecting data the researcher and advocate would spend time with the autistic individual, learn about their preferences and design an information sheet based on this information which will then be provided to the participant. In particular, information relating to the number, time and place of interviews, the preferred communication styles and the support services that could be accessed if the participant experiences distress throughout the research process were included on the information sheet during the process of obtaining consent.

Conclusion

Throughout this chapter, it has been demonstrated that disability, and in particular autism, cannot be reduced to either the experience of impairment or the experience of social and environmental barriers. Rather there is a need to acknowledge the role that both play in the discourse of disability, and the impact this has on working alongside autistic people in educational research (Gallagher, Connor, & Ferri, 2014). The use of universal design principles throughout the research design process has been suggested as an effective technique for developing research that supports the participation of autistic individuals. More specifically, universal design strategies that have been used to address the ethical concepts of benefit, risk and consent have been shared with the hope that more researchers will be confident in obtaining ethical approval for research conducted with individuals from the autistic community. Furthermore, researchers who work with all people who experience disability can

modify, build upon and improve such strategies to further empower those marginalised through disability and generate productive and transformative outcomes for these educational fringe dwellers.

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Part III

Researching About Cultural Differences and Intercultural Experiences: Introduction

Patrick Alan Danaher

The five chapters in the third section of this book traverse from varied perspectives the equally complex and crucial strategies involved in researching about cultural differences and intercultural experiences. In many ways, these differences and experiences encapsulate both the best and the worst of human aspirations and behaviours. From a positive perspective, diversity of cultural practices and of interactions across cultures constitutes a celebration of the heterogeneity of humans' engagements with the world and facilitates the communication and articulation of the multiple voices attending those engagements. From the opposition position of negative perceptions, particular cultural practices and intercultural interactions are constructed as being deficit and even deviant when compared with such practices and interactions associated with dominant and mainstream positions. Accordingly, researchers working within the educational margins often find recurring resonances and striking synergies between such margins and specific expressions of cultural differences and intercultural experiences.

In Chap. 9, Bronwyn Wong interrogates the interplay between Christian spirituality on the one hand and the material effects of a market-driven schooling system on the other hand in the context of an independent Christian school in New South Wales, Australia. Her fellow teachers and she felt considerably marginalised as a consequence of this disparity, derived from a significant cultural gulf between their faith and

the exigencies of teaching against the backdrop of excessively competitive individualism. The chapter explores how participating in an action research project helps to empower the author and her fellow teachers to reframe schooling in a very different and more transformative way.

Chapter 10, written by Megan Forbes, takes up the continuing cultural dissonance between Australian Aboriginal communities and mainstream Australian society, signifying the ongoing negative impact on those communities of Australian colonisation. Despite this impact, the author explains how yarning, an Indigenous method of conversation and knowledge sharing, has emerged as a successful strategy in her research for building mutually respectful and trusting relationships between the participants in her study and herself. Yarning is presented as an effective means for facilitating authentic and enduring intercultural understandings that serve as a counternarrative to Australian Aboriginal communities existing on the cultural and educational margins.

Mike Danaher ponders in Chap. 11 the intercultural understandings arising from a study tour to China conducted by his Australian university undergraduate students and himself in November 2018. Interpreted through the lens of critical interculturality, this study tour is demonstrated to have both strengths and limitations in challenging existing intercultural stereotypes and in generating new awareness that went some way towards recuperating Chinese–Australian relations that might otherwise be relegated to educational margins of mutual incomprehension and suspicion. The author's analysis of his students' reflections on the study tour highlights the possibilities of, as well as the restrictions on, such reflections as an intercultural pedagogical technique.

In Chap. 12, Samantha Burns and Patrick Alan Danaher also take up the concept of critical interculturality, albeit from the different perspective of Dhofari women's experiences of studying English language courses in Oman, as part of the first-named author's doctoral study. Drawing on selections from the first-named author's semi-structured interviews with the women who participated in her study, and also on particular royal decrees issued by the late Sultan of Oman, the authors highlight the undoubted success of the women and their fellow students in navigating between Omani tradition and tribalism on the one hand and Western education experiences on the other hand. The chapter also helps to

communicate and articulate the participants' voices in ways that accentuate the complexity and contradictions in that navigation that in turn demonstrate that, from each perspective, the other position is potentially located within educational margins.

Finally in this section of the book, Chap. 13, written by Geoff Danaher and Patrick Alan Danaher, posits both occupationally mobile communities and the scholars who conduct research with them as educational border crossers, in the process engaging with highly diverse cultural expressions and also generating sometimes profoundly influential intercultural experiences. This proposition is illustrated by reference to the authors' long-running research with Australian and British fairground people, analysed through the prism of an updated conceptualisation of border crossings. The chapter explores particular research methods that the authors have found to be effective in communicating and articulating the voices of members of these occupationally mobile communities, and that in the process help to ameliorate the misunderstandings associated with learning and researching within certain educational margins.

9

Cultivating a Vision for Change: Applying Action Research to Empower Teachers in an Independent Christian School in New South Wales, Australia, in a Market-Driven Schooling System

Bronwyn Wong

Abstract Australian independent schoolteachers are immersed in a conflict between the market and an education that is about flourishing for humanity. A market-driven demand for successful results that secures a school's economic viability contradicts the desire of teachers to envision education as being about equipping students to contribute dynamically to a world that is incarcerated by suffering. The author's doctoral study, which explored the experiences of six fringe-dwelling teachers at an Independent Christian school in New South Wales, Australia, forms the basis of this chapter. Using Caine and Caine's (*Strengthening and Enriching Your Professional Learning Community: The Art of Learning Together*. Alexandria, VA: ASCD, 2010) Process Learning Circles and the Tripod

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of Shalom in an action research project, the teachers considered how, from within a transactional paradigm for education, they could be empowered instead to reframe education for Shalom.

Introduction

My experience with Christian education began in 1983 when I was eight. It was my parents' decision to gather all of our belongings and, piling into our dilapidated, dirty-yellow Passat, to uproot from a tiny town in the Riverina, New South Wales, Australia. This world was characterised by salt-bush; myall and swamp box; swimming in the Murrumbidgee River—the shrimps hungrily biting our bottoms; the odd dust storm swirling in from the West; and an expanse of sky that glittered and disappeared into a shimmering haze. Traversing this horizon that had previously demarked the known from the unknown, we rattled into Sydney—stalling at every traffic light—and began a new life so that my father could take up the role of Deputy Principal at a Christian school.

Today as I write, with 20 years' experience as an educator in Christian schools, it is I who am on the brink of taking up the position of Deputy Principal at a Christian school in Sydney. During my 20 years, I have become deeply invested in the vision, purpose and distinctiveness of an authentic Christian education. I have also come to realise that an education such as this is problematic—marginal.

Margins: Setting the Scene for Research

Margin: Different. Separated. On the edge (Cambridge Dictionary, 2019). Each of these words captures the substantial challenges that are faced by a Christian school to imbue an authentic Christian education in a market-driven context. The increasing desire of some Christian schools

to avoid at all costs the perceived blemish of a rubber stamp marked "different" or "on the edge" is a concern and I cannot help but think that it is not stretching the imagination too far to appropriate the description of "a sky screaming danger" (Levy, Rawsthorne, & Berry, 2019, n.p.) as an apt portrayal of the battle on this margin. I speak here of a market-driven concept of schooling that seeks to quantify success and to narrowly define the purpose of education as focusing on elevating the country's gross domestic product (GDP) (Deloitte Access Economics, 2016; Holden & Zhang, 2018).

In a market-driven context, the purpose of education has been directed towards its capacity to amass wealth, consequently morphing students into efficient, problem-solving machines for a globally competitive economy. The coupling of education with wealth and employment has been broadly documented in the media. Andreas Schleicher (2016), Director for Education and Skills at the Organisation for Economic Cooperation and Development (OECD), has argued that lost economic output as a result of poor education policies and practices has a significant impact on a country's long-term economic growth.

In Australia, reports such as *The Economic Impact of Improving Regional, Rural and Remote Education in Australia* (Holden & Zhang, 2018) have claimed that "if the human capital gap between urban and non-urban Australia was closed, Australia's GDP could be increased by 3.3%, or $56 billion" (p. 2). Higher results in the New South Wales Year 12 examinations (the Higher School Certificate—HSC) have been emphasised because the students who achieve them "are the future workforce. Their skills and creativity underpin the state's economic and social prosperity" (BOSTES, 2015, p. 3). More broadly, in the United Kingdom, the Guardian has reported the inability of students to draw, play music or engage with other languages, citing that these subjects had been sidelined because of teacher pressure to improve outcomes for reading, writing and mathematics ("Secret teacher: subjects like art are being sidelined—But they matter", 2018). This trend was noted four years prior by Steers (2014) who cautioned that the exclusion of the Creative Arts in England's National Curriculum could only envision the decline of these subjects. With regard to Australia's National Assessment Program—Literacy and Numeracy (NAPLAN), Dowling's (2008) review justified the

accountability that was achieved through external tests, stating that there was a "growing realisation that education is a major factor in economic development" (p. 1).

The consequent elevation of high stakes testing in Australia through ranking schools and reporting results on the My School Website (ACARA, n.d.), allowing parents to shop for the school most likely to achieve academic success for their child, poses challenges for Christian schools that rely on enrolments for their economic viability. Parents have received the message that "education is the key to prosperity" (Hill, 2016, n.p.). The phenomenon of parents pursuing available real estate according to the highest achieving school zones has been documented widely (Black, 2016; Collister, 2019; Schneider, 2017; Tanner, 2019), spawning a variety of manuals—such as the GoodSchools Guide—that parents may use to determine the best housing property based on school rankings. The pressure to compete in this market in order to maintain enrolments tempts Christian schools to shift their priorities from imbuing an authentic Christian education to elevating results that will testify to their academic success. Additionally, a competitive market for education can influence a Christian school to direct its attention to branding. The adverse impact of a market-driven context on a Christian school has been described by Roy (2013) who stated that: "Some [Christian schools] are just relatively more up-market, selective, academically competitive clones of the public school down the road, but with a veneer of spirituality thrown in" (p. 19).

While academic excellence *should* be an important outcome of a Christian Education, the methods to achieve this excellence and the reasons behind the desire for excellence must be vastly different to the reductionist view that education offers fiscal salvation for a nation's economy and personal wealth. Rather, an authentic Christian school education should be about Kingdom-shaping for Shalom. Shalom is a vision for creation as it was meant to be. This pivots around a life of flourishing and prospering (Bartholomew & Goheen, 2008, p. 45) where people live in thriving, harmonious and life-giving relationships (Nessan, 2010, p. 10) "with God, themselves, each other, and nature—and … tak[e] delight in such relationships" (Wolterstorff, 2004, Introduction, para. 7). Shalom reflects the nature of the Kingdom of God because it is "the webbing

together of God, humans, and all creation in justice, fulfilment and delight" (Plantinga, 1995, p. 10). Establishing the Kingdom of God, a state where God's rule is evident through Shalom, is central to the mission of Jesus Christ. This was demonstrated in the Lord's Prayer: "Your Kingdom come, your will be done on earth as it is in heaven" (Matthew 6:10, The New International Version). A Kingdom-shaping education is therefore conducted with three major foci. These are recognising the Creator God's intents and authority; reconciled through the ministry of Jesus Christ (the Son of God—the Lord); and led by the Holy Spirit—individually and together as the community of God, to usher God's rule through actively setting about restoring and transforming the world (Wong, 2020).

Marginal is an apt description for a Kingdom-shaping education, as discovered in the research project that was central to this study. This is because teachers who are committed to Kingdom-shaping must, in the vein of Sisyphus, wrestle with the seemingly impossible task of pushing their ideals for a redemptive education (that is about restoration and renewal) up a steep hill only to have them hurtle back down again. They are forever pulled by the default position of a narrow but overcrowded curriculum and the quantification of results. These teachers find themselves on the edge, demoralised and at risk of being devoured by the utilitarian machine that relentlessly bleeds them dry.

Action Research: Cultivating a Vision for Change

In 2018, I conducted Action Research (AR) at Yew Tree Christian College (not the school's real name) in New South Wales, Australia. The aims of the doctoral project were to identify the understandings that a group of teachers had of Kingdom-shaping Christian education; to identify the hindrances that they were facing in imbuing Kingdom-shaping practice; and to consider how implementing Kingdom-shaping principles might be transformational for their teaching practice. Critical pedagogy was chosen as a paradigm. This model dynamically produces "undeniably

dangerous knowledge, the kind of information and insight that upsets institutions and threatens to overturn sovereign regimes of truth" (Kincheloe, 2008). The six participating teachers in this research project were given opportunities to question their practice and consider possibilities for cultivating flourishing in the midst of the reductionist market-driven context in which they were placed.

The six teachers from Yew Tree Christian College who were invited to participate in this Case Study approach (Starman, 2013) to qualitative research were chosen using purposeful sampling (Patton, 1990). This methodology afforded a diverse and dynamic vision of the life and energy of the school to emerge from their interactions with each other. In order to provide varied gender and subject perspectives from throughout the school, the participants consisted of three males and three females from a range of teaching disciplines in the Primary and Secondary departments. We met in Process Learning Circles (PLCs) (Caine & Caine, 2010), over the duration of a year, and collectively used AR to grapple with how, in a market-driven context, a Christian education that was focused on Kingdom-shaping could be imbued in our teaching practice. AR formed the methodological framework for this research project. It was selected because human flourishing—the desired outcome of Shalom—is often a goal of AR activities (Bell et al., 2011) and because AR allows a researcher to work in partnership with participants to reconstruct and transform practices that have been identified as dehumanising (Somekh, 2006).

As I embarked on this project, having previously used AR as a tool to leverage my own teaching practice, I had the heady idea that all would be smooth sailing. But my actual reality was eloquently described by Margaret Atwood (n.d.) in her poem "Journey to the Interior" where she penned: "travel is not the easy going point to point, a dotted line on a map. … I move surrounded by a tangle of branches, a net of air and alternate light and dark" (n.p.). Finding myself with no clear path was unnerving. My intention had been that—following Coghlan and Brannick's (2005) AR cycle of diagnosing, planning action, taking action and evaluating action—like a roadmap, we would bash our way through the untamed undergrowth and bravely chart a new course for Kingdom-shaping education. If only it were so easy! Painfully, I constantly second guessed myself—assisted by well-meaning fellow researchers who would

ask with furrowed brows: "Are you sure you are doing Action Research?" It was difficult to tell where one cycle ended and another began, and the process of understanding whether we were really making any tangible progress in transforming our practice and our broader context at Yew Tree Christian College was grossly difficult. The research experience was far more like walking in circles and characterised by back tracking and erratic movements of the sun (Atwood, n.d.). Nevertheless, Sumara and Luce-Kapler's (1993) concept of AR as a "co-labouring" process where they elucidated collaboration as toiling together, "exert[ing] body and mind in ways which are sometimes painful" (p. 393), was immensely liberating as we convened monthly.

An important contributor to the co-labouring process in this research project was my position as an insider researcher (Kerstetter, 2012; Milligan, 2016). My place on staff at Yew Tree Christian College during the time that the AR occurred meant that I held nuanced understandings of the culture of the school and wrestled with the same challenges as the participants. Consequently, a deep sense of trust was built between us—a group of seven fringe-dwellers who, inspired by an alternative vision for education, privately shared our angst and valiantly strove for change.

Caine and Caine's (2010) Process Learning Circles was selected to structure the regular meetings with the participants because it incorporated AR and followed four pre-planned phases that were applied in this research project through: considering the impositions that were obstructing our desire to imbue Kingdom-shaping practice; reading new material that could inspire our direction; planning intervention; and reflecting on what we had learned. The predictability of the meeting structure meant that—as the participants became familiar with it—they were able to take turns facilitating the meetings and develop a sense of ownership for the research. This mitigated my inability—despite original intentions—to use Participatory Action Research (PAR) (McTaggart, Nixon, & Kemmis, 2017; Swantz, 2011). PAR could not be applied to this project because it would prevent my using The Tripod of Shalom (Wong, 2020) as the lens for understanding the nature of Kingdom-shaping education for Shalom.

Each of the PLCs meetings—eight in total—was audio recorded and the transcripts analysed using Fairclough's (2010) Critical Discourse Analysis (CDA). Fairclough's three dimensions—text analysis, discourse

practice and sociological practice—framed the analysis of participant talk, the interpretation of that talk and an explanation of the sociocultural practice that may have contributed to that talk. The Tripod of Shalom—defining the three dynamic components of Kingdom-shaping education for Shalom as: The Word (spiritual knowing), incarnation (being) and Proclamation (doing)—was used as a transdisciplinary (Fairclough, 2003) lens in the third dimension—sociological practice—to reveal the participants' understandings of Kingdom-shaping education. Similarly, Lacan's (Neill, 2013) Master Discourse was used to explicate the hindrances that the participants were finding in imbuing Kingdom-shaping practice at Yew Tree Christian College. Fairclough's (2010) CDA therefore allowed the voices of the participants to emerge multidimensionally and for a growing comprehension of the nature of Kingdom-shaping education to develop.

Articulating the Voices of the Participants

An impression of the educational fringe-dweller began to take shape through the empowered voices of the participants. Transcribed descriptions of their experiences at Yew Tree Christian College identified them as out of step with the increasing emphasis that was being placed there on branding, results and dehumanising practices. As they talked about their perceived obstructions to Kingdom-shaping education, one of the key hindrances that emerged was a sense of pressure to achieve results and that the level of teaching that was subsequently required to achieve this allowed no time for pondering Christian principles or considering a holistic shaping of their students. James (all participants are known by pseudonyms), for example, described feeling "disheartened" because he "wanted to [explore] it again but I had to go on to the next thing". Similarly, Philippa expressed that "we are so bound by our programmes. … I guess we can't really branch out." Their evocative expressions of being "disheartened" and metaphorically bound by requirements suggested that, for them, their acquiescence to the tyrannous voice of the master was existentially alienating. Philippa's further description of assessment as "disastrous" and merely interested in "categorising [students] into an

order" summed up a fear that the practices that were required of them in order to meet the agenda of the school—and the broader market-driven culture—were actually harmful for their students. The expression of their wistful desires for exploration and branching out that were placed antithetically in their talk to "the next thing" encapsulated their feelings of frustration. Finally, Mary voiced the apprehension that "such a lot of pressure that's suddenly come from nowhere [for Year 11 and 12] to just be getting results" might be an indication that "we're just grammar schooling ourselves". Her repeated use of the adverb "just" emphasised the derision she was feeling towards a reductionist focus on results and the school's attempts to dress itself up in the borrowed finery of a grammar school.

In the midst of the increased focus on elevated results, participants also spoke of a decreased focus on spiritual elements at Yew Tree Christian College. Kevin described that "[prayer is] not a common practice anymore" and Mary agreed with this saying that "we have definitely shifted. … I don't expect to pray with a parent anymore." The almost identical phrasing of their comments amplified what they were saying, and the repetition of the word "anymore" suggested that, in the past, prayer had very much been a part of the culture at the College. Discussing the article that had been collectively read as part of PLCs Meeting 5, Mary expressed: "I felt very confronted by that article … it isn't the direction that we are seemingly taking … the high ideals that were placed on a Christian education". This articulation that Knight's (2006) ideal vision for Christian education was far from the reality at Yew Tree Christian College unleashed a further expression from the other participants, culminating in Shane's view as he reflected on the AR intervention so far: "I don't think we're … pushing back against how we should be teaching the students. I think it's almost like we're pushing back against the direction that … the executive or the school is taking". At this point, it became clear to the participants that they were fringe-dwellers, at odds with the course that the school was taking and that any "push back" would potentially have a price to pay.

Nevertheless, push back they did. Over the course of 2018, they engaged in three cycles of AR. Initially, as they grappled with the symptoms of a market-driven approach that were manifested at the school through student apathy, they decided to experiment with creating a

"spark" that would, at least momentarily, arrest the students from their disengagement and cause them to take greater ownership of their learning. It was believed that apathy did not exemplify flourishing—a key indicator of Shalom. A variety of methods were used by the participants, including building stronger relationships with their students, revising discipline approaches and trialling pedagogy that would connect with the students. During this first cycle, however, there was an unsettled feeling that we were missing the point. In Meeting 4, as the participants reflected on their intervention, they questioned whether they were actually practising Kingdom-shaping education. Shane encapsulated this through the statement that "I think it's great that our students are … tak[ing] more ownership, but how is that different to even if we were secular teachers?" and Philippa summed up the rising concern: "I don't know how to do it". Each meeting closed with the opportunity for participants to devise a metaphor or choose a word that captured their understanding of Kingdom-shaping education. In this first cycle, participants chose words such as tangled, unsure and daunted, indicating that, at this point in the AR, we were lost, but hopeful that a path would emerge.

Gradually, using The Tripod of Shalom to guide our slippery understanding of Kingdom-shaping education for Shalom, an inkling began to stir within us that Kingdom-shaping education was not only about *doing* something to change the way that we were teaching, but that its essence was also to be found in our spiritual *knowing* which would emerge through our *being* Kingdom-shaping. This epiphany was expressed by many of the participants in the latter part of the research project. By Philippa who stated that "it's challenging me to think … what it would look like to be Kingdom-shaped as opposed to assessment-shaped or curriculum-shaped" and James who questioned: "do I need to think about a Kingdom-shaped James before I can grasp how it works with others as well?" This was a turning point for the AR and brought us to a realisation that we were at the end of the first cycle and needed to devise a new intervention. Accordingly, the group decided that restoring the importance of prayer and intentionally living a Kingdom-shaping life were the most appropriate actions that would push back against the reductionist tendencies that were taking place at the school and that were indicated by Shane's description that "we're becoming much more robotic".

In the final PLCs meeting, as the participants reflected on the AR project as a whole, they shared that the AR intervention had taught them much about the nature of Kingdom-shaping education for Shalom. Most encouragingly, Philippa declared that she had been liberated from her previous fears about the effects of curriculum pressures and overt testing, stating that: "I used to worry so much about all the outside forces that were challenges. BUT there is so much that CAN be done regardless, so why worry so much about this?" Andrea's succinct summation that "Christian education is not quite the same as Kingdom-shaping education—the latter is necessarily transformative, relational and affects the whole person" offered a sense of hope that the project had indeed imbued within the participants a consciousness that things could possibly be different if we were willing to be the change. This was reflected also by Shane's realisation that he had previously been very teacher focused in his approach to teaching but that now "I've come to see the value of working alongside students".

Conclusion

Lurking in the murky depths, however, was a shadow. These teachers were fringe-dwellers. They had, over the space of 12 months, shared a precious experience of dangerously questioning their practice and pushing back against the suffocating elements of the market that were becoming more evident at their school. Elements like a complete rebranding—including crest, motto and uniform—automated reporting and intense pressure on staff and students to elevate results. Mary summed up this divergent experience through expressing: "It has been a really challenging year and I don't think I understood what the cost would be to make a stand for authentic Christian schooling. I need to be a voice for holding firm to this authentic approach, even as the ship potentially takes a different route." Similarly, by the end of 2018, I found that the disparity between my own convictions regarding a Kingdom-shaping education for Shalom and the vision and values of Yew Tree Christian College, where I had taught for over a decade, had become a yawning chasm. At the time, there was considerable grief in the realisation that my own

journey with the school, a place that had nurtured and honed my craft and where I had been mentored by experienced Christian educators, was over. However, I came to recognise that my time at the school had been my own preparation, the embryonic growth and maturation of a seed in a pod that would burst forth and, carried by the wind, be taken elsewhere to be planted and bear fruit. Despite the fact that we had not been able to overcome the forces that were hostile to our vision for Shalom at Yew Tree Christian College, collectively we learned through our own transformation—and the associated glimmers of hope that arose—that fringe-dwellers working together are able to emerge from the margins and forge their own sense of place and that "together, all together, they are the instruments of change" (Hulme, 2001, p. 4).

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10

Privileging the Voices of Australian Aboriginal Communities Marginalised by Colonisation

Megan Forbes

Abstract Despite significant disparities existing between Indigenous and non-Indigenous Australians, many Indigenous communities argue that little of the research conducted with them has benefitted them. Further, decades of research with Aboriginal communities have brought little improvement in the research methods used. Yarning, validated in Australia and elsewhere, is one potential method that may be employed by researchers when engaging with Indigenous communities. Yarning is an Indigenous method of conversation through which all participants share knowledge and learn from one another. When used for research, yarning is a rigorous process that promotes the development of relationships built on trust and mutual respect between researchers and participants. This chapter explores the use of yarning as a culturally appropriate and empowering research method when engaging with Indigenous Australian communities.

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Keywords Aboriginal and Torres Strait Islander people • Community/ies • Memorialisation • Social wellbeing • Yarning

Introduction

This chapter focuses on the lessons learned during my PhD research with Aboriginal communities in South West Queensland, Australia. Following colonisation, these communities often experienced ongoing marginalisation, lower health, and lower life expectancies than their non-Indigenous counterparts (Australian Indigenous Health*InfoNet*, 2016; Newton, Day, Gillies, & Fernandez, 2015, p. 40). Community consultation, and guidance from community leaders and past research, my study was informed by an Indigenous paradigm and employed yarning, an Indigenous research method, as an interview technique. This case study explores the ethical and practical implications of me, as a non-Aboriginal researcher, being guided by communities in the use of this culturally appropriate research method. Additionally, the chapter explores innovative methods of engaging in reciprocity that supported participants in communicating their experiences. Although my research was undertaken with Aboriginal communities in South West Queensland, the term "Indigenous Australians" includes both Aboriginal and Torres Strait Islander peoples. However, when referring to members of the communities who partnered in my research, I will use terms such as "Aboriginal people in South West Queensland".

My research resulted from consultancy work for an Aboriginal corporation and their partners across South West Queensland, each of whom was contributing post-contact heritage sites to a 1000 kilometre Indigenous self-drive cultural tourism trail. The first stage of my PhD research included interviews with elders, Aboriginal health workers, and community leaders in six communities across the region. I sought to understand what social and emotional wellbeing (SEWB) meant to Aboriginal people across South West Queensland specifically during this phase. Social and emotional wellbeing is a multidimensional concept often preferred by many Indigenous Australians to the term "mental

health", owing in part to the stigma associated with mental ill-health, and because SEWB is better aligned with their own holistic conceptualisations of health and community (Dudgeon, Bray, D'Costa, & Walker, 2017; Dudgeon & Walker, 2015; Garvey, 2008). Each of these communities wished to memorialise their post-contact experiences and had, at a minimum, installed signs at places of significance to them. However, two of these communities had completed more comprehensive memorials. These included tangible memorialisation such as an interpretive shelter, replica humpies, and a museum, as well as intangible memorialisation such as commemorative festivals, smoking ceremonies, and language revitalisation. These two communities each contributed their projects as case studies to the second phase of my research which sought to understand the influence that memorialisation had on the SEWB of Aboriginal people in South West Queensland. Each of the six communities was partners in the original consultancy project. Thus, my PhD research built upon the relationships that community members and I had formed during the original project.

Memorialisation

The lived experience of many Indigenous communities across Australia often remains relatively unknown by outsiders today (Finlayson, 1991). However, colonisation traumatically disrupted the lives of Indigenous Australians through processes such as dispossession from ancestral lands, disruption to culture through the outlawing of language and ceremony, and the forced removal of children from families known as the "Stolen Generations" (Atkinson, 2002; Calma, Dudgeon, & Bray, 2017; Dudgeon et al., 2015; Zubrick et al., 2014). Since history tends to be constructed by victors, those who were invaded often need to wait significant periods of time before it is possible for them to engage in the memorialisation of their experiences (Meskell, 2002). Internationally, research indicates that even when memorialisation takes place years after traumatic events it may assist communities whose lives were disrupted by marginalisation, conflict, and violence. This is because memorialisation supports communities in creating channels through which survivors may

share the past, publicly counter past discriminatory discourses, and witness their experiences being acknowledged (Ashworth, 2002; Hamber, 2004; Marschall, 2010a). In addition to these valued socio-political outcomes, memorialisation may create opportunities for communities to generate coherent narratives to be passed to younger generations, thus enhancing the dignity of those who survived and the collective identity and pride of the community (Carr, 2012; Marschall, 2010a, 2010b). Further, younger generations who did not personally experience the conflict and violence often experience a shared sense of grief with their community that may be mediated through processes of memorialisation (Marschall, 2010a, p. 78). Manderson (2008) argues that in this context much of the international literature may be applied to Indigenous Australians and their experiences of conflict and marginalisation following colonisation.

Across South West Queensland, the Aboriginal communities who partnered in this research had chosen to memorialise the fringe camps on which many of their older members had been forced to reside prior to 1967. Although post-contact sites such as fringe camps hold deep significance for many Indigenous Australians, to date the memorialisation of such heritage has been rare and there are often few physical traces remaining (Byrne, 2004; Read, 2000). One reason is that the few memorials that have been developed by Indigenous Australians have experienced vandalism. Another may be that past inhabitants of fringe camps and their descendants may continue to experience dissonance around these sites which they associate with the strong community ties that linked them to a collective Indigenous identity, and memories of the difficult conditions experienced while living on the camps (Read, 2008). The communities in South West Queensland engaged in memorialisation for a number of reasons pertaining to the cohesion, identity, and pride of their own communities, and others that were aimed at educating outsiders. Older community members wished to create permanent records of their past experiences that could be passed on to future generations, and places where they could gather to remember the past and people who were no longer with them. In seeking to educate outsiders, the communities partnered in creating a self-drive Indigenous cultural heritage trail that included the memorial sites and is advertised through brochures

Fig. 10.1 A memorial that includes an interpretive shelter and a replica humpy

in local tourist information centres and via a website. Figure 10.1 presents an image captured during my fieldwork of an interpretive shelter and replica humpy that sit on the site of a fringe camp that was once home to many Aboriginal families in South West Queensland.

Researcher-Participant Relationships

From the early design phase of my study I prioritised the wisdom of Aboriginal Elders, health workers, and community leaders. This framed the project's design and research methods. My case study focused on a process of ongoing consultation and the use of the recommended research method, yarning, during interviews. This process adhered to ethical guidelines for engaging in research with Indigenous Australian communities, including the Australian Institute of Aboriginal and Torres Strait Islander Studies' (AIATSIS) Guidelines for Ethical Research in Australian

Indigenous Studies; the National Health and Medical Research Council's (NHMRC) Guidelines for Ethical Conduct in Aboriginal and Torres Strait Research (AIATSIS, 2012; NHMRC, 2003); and the principal that quality research outcomes are linked to relationships that are built upon respect and trust (Laycock, Walker, Harrison, & Brands, 2011b).

Researcher-participant relationships may be influenced by perceived differences in power, even when a researcher is committed to ethical practice (Hewitt, 2007). This risk may potentially be amplified for Aboriginal participants due to historical disempowerment and marginalisation (Askell-Williams et al., 2007). In the past negative experiences with researchers, including a lack of community consultation and few benefits from research for participating communities, have left many Aboriginal communities feeling wary of engaging in research projects (Brereton, Roe, Schroeter, & Lee Hong, 2014; Farnbach, Eades, & Hackett, 2015). By contrast, when researchers seek cultural supervision and consult community members they are more likely to successfully employ methods that meet the needs of their partner communities (Atkinson, Nelson, Brooks, Atkinson, & Ryan, 2014; Brereton et al., 2014; Dudgeon & Walker, 2015; Gorman & Toombs, 2009; Laycock, Walker, Harrison, & Brands, 2011a).

When European researchers undertook early research conducted with Indigenous peoples worldwide, the research was frequently informed by the colonial discourse that perpetuated exploitation and power differentials between colonisers and the Indigenous peoples they encountered (Dudgeon, Rickwood, Garvey, & Gridley, 2014; Dudgeon & Walker, 2015; Martin & Mirraboopa, 2003; Wilson, 2003). Despite decades of research being undertaken with Aboriginal communities, Gorman and Toombs (2009) argued that there has been little improvement in the research methods used. Today, recommendations for researchers when entering into a research partnership with Indigenous Australians include researchers positioning themselves as learners on a journey with participants through stories and memories that align with the research topic (Leeson, Smith, & Rynne, 2016). Further, evidence indicates that researchers should be informed by Indigenous paradigms that place priority upon their relationship with participants and share knowledge through relational, story-telling methods such as yarning (Hart, 2010;

Kovach, 2010; Stewart, 2009; Wilson, 2003). Although there is no paradigm universal to Indigenous peoples worldwide, commonalities in relational values have stemmed from generations of knowledge being shared through relational, story-telling, methods (Loppie, 2007). Thus, research methods that honour the sharing of knowledge through relational means and value the protocols that are important to participating communities are congruent with Indigenous paradigms (Kovach, 2010, 2015; Lavallée, 2009; Leeson et al., 2016; Martin & Mirraboopa, 2003). While storytelling methods may be employed during qualitative research conducted within Western paradigms, when employed within an Indigenous framework they are distinguished by their strong focus on relationships formed during the process, and on honouring the cultural protocols that are important to participants (Gorman & Toombs, 2009; Kovach, 2010). Yarning offers Indigenous people a relaxed approach to research through which they can talk about their experiences (Geia, Hayes, & Usher, 2013).

Assisting with the original consultation project gave me an opportunity to work with communities and build relationships prior to the start of this research. Additionally, this allowed me to engage in consultation with communities on the research design. A fundamental element of conducting research with Indigenous peoples is the privileging of their voices in the process towards emancipatory research outcomes (Leeson et al., 2016). Throughout this process, I sought advice from Aboriginal Elders, health workers, and other community members as experts in their own lives. As a non-Indigenous Australian partnering in research with Indigenous communities this was an important part of the research process since Indigenous voices were often silenced through colonisation, with this silencing often perpetuated through research that employed inappropriate methods (Dean, 2010; Dudgeon et al., 2014; Gorman & Toombs, 2009; Laycock et al., 2011a).

Yarning

During community consultation, yarning was recommended as a research method that would support community members in feeling comfortable during the interview process. This recommendation was supported by

past research indicating that yarning is a culturally appropriate research method that acknowledges participants as experts in their own lives (Laycock et al., 2011a). Feedback from participants during the initial project was positive. Therefore, following ongoing community consultation I employed yarning as an interview method for my PhD research. These steps were congruent with evidence suggesting that consulting communities on the research methods used and following protocols valued by the community empowers participants through the research process (Atkinson et al., 2014; Hart, 2010; Scheyvens, 1999; Wilson, 2001).

Yarning is an Indigenous form of conversation through which all participants share knowledge and learn from each other (Laycock et al., 2011a). Yarning has been validated in Australia and internationally as a credible and rigorous Indigenous research method that promotes relationship building between participants and researchers (Bessarab & Ng'andu, 2012; Geia et al., 2013). When used for research, yarning allows for unstructured and semi-structured interviews to take place through relaxed and informal discussions through four non-linear stages that are discussed below (Bessarab & Ng'andu, 2012; Geia et al., 2013; Saunders, Usher, Tsey, & Bainbridge, 2016). It is recommended that yarning interviews begin with introductions facilitated by an Aboriginal contact trusted by communities and researchers, a protocol that was congruent with the advice I was given by the participating communities (Laycock et al., 2011a).

The aim of the first stage, known as "social yarning", is to establish relationships built on trust between participants and researchers. This process is supported through interactions that promote an equal process rather than an interview setting in which one person is considered an expert and the other a participant (Bessarab & Ng'andu, 2012). These interactions provide participants with the opportunity to observe researchers, discover who they are, and decide how much trust they feel comfortable in giving them. Additionally, these interactions provide researchers with opportunities to become more familiar with their participants' worldview (Bessarab & Ng'andu, 2012; Rynne & Cassematis, 2015).

During my PhD research, social yarning began with personal introductions given by a community leader or Elder, with them supporting

the introduction of my project. Most often we conducted initial social yarns over shared meals with a number of community members gathered in the offices or board rooms of Aboriginal corporations. While subsequent interviews were often arranged with individuals who had attended these initial meetings, each began with a shorter social yarn that included enquiries about each other's health, families, and community news. Discussing consent or thanking participants for agreeing to the interview provided a transition from social yarning to the next phase, "research topic yarning" (Bessarab & Ng'andu, 2012; Laycock et al., 2011a).

Despite remaining relaxed and interactive, research topic yarning is also purposeful, with participants sharing stories and experiences that are related to the research topic during semi-structured or unstructured interviews. This stage builds upon the relationships formed during social yarning, with the quality of the data influenced by the trust formed during this phase (Bessarab & Ng'andu, 2012). My experience of yarning in South West Queensland indicated that although discussions of consent forms and thanking participants could provide useful transitions between the first two stages of yarning, participants themselves often indicated when they were ready to transition from social yarning to a more purposeful discussion on the research topic. Frequently the end of shared meals provided another useful transition and a point at which participants would indicate that they were comfortable to discuss and sign consent forms. Tools for bringing research topic yarning to a close include extending further thanks to the participant, and by reiterating agreements made during the social yarning stage on what will happen next (Bessarab & Ng'andu, 2012).

During research topic yarning there are two additional stages that participants may choose to enter into while sharing their stories. The first is collaborative yarning, during which participants and researchers actively share ideas and information about community projects, a process that promotes strong, reciprocal relationships (Bessarab & Ng'andu, 2012; Brereton et al., 2014). At times researchers might feel that collaborative yarning is meandering away from the research project. However, in their validation of yarning as a research method Bessarab and Ng'andu (2012) recommended that researchers listen during this phase which participants may use to speak about the research project in their own ways. Further, if

researchers intervene too quickly during this stage they may limit the potential for participants to share their stories, and to discuss stories relevant to the research topic with each other (Bessarab & Ng'andu, 2012; Walker, Fredericks, Mills, & Anderson, 2014). Thus, rigour is applied in yarning when researchers listen attentively and allow participants' stories to flow while looking for threads that relate to the research topic. Because participants may use language that is not expected in the academic process when describing their lived experience it is particularly important to listen to their story as they choose to present it rather than according to a pre-set research plan (Bessarab & Ng'andu, 2012). Thus, the role of the researcher is to be an active listener and observer, remaining aware of the influence that their western academic understandings may have on communication and relationships during interviews (Bessarab & Ng'andu, 2012; Fredericks et al., 2011).

During my PhD research participants did choose to engage in collaborative yarning at times. They often discussed challenges they had faced either in setting up their projects or in promoting them to tourists. Reciprocity is relevant to research informed by Indigenous paradigms and using Indigenous methodologies (Wilson, 2001). However, Geia et al. (2013) lamented that they and other Indigenous researchers still frequently read about research conducted with Aboriginal communities that includes little or no reciprocity, arguing that such research continues to silence and marginalise people. Thus, when conducting research that is informed by an Indigenous paradigm researchers must continually ask themselves whether they have fulfilled their obligations to participants (Bessarab & Ng'andu, 2012; Wilson, 2001). I found that collaborative yarning often provided opportunities for me to engage in reciprocity using prior skills and knowledge that I had brought into the research relationship, for example, by taking photographs of sites that were being memorialised and were significant to participants, or by contributing writing skills to grant applications for ongoing community projects.

The final stage that participants may choose to enter into during research topic yarning is named "therapeutic yarning", during which participants may choose to include deeply personal, emotional, or traumatic lived experience in the research topic yarn (Bessarab & Ng'andu, 2012; Laycock et al., 2011a). In such instances, Bessarab and Ng'andu (2012)

proposed that the researcher takes on the role of listener, giving support to participants as they speak and have their story affirmed. Thus, when participants share their stories through yarning, they are provided with opportunities to have their lived experience heard without judgement in ways that allow the yarn to keep moving before being redirected back into the research topic yarn. In this way the use of yarning as an interview method allows deep exploration of research topics through lived experience while promoting the development of relationships.

My research focused on the memorialisation of fringe camps whose destruction often splits communities apart. Many Aboriginal people, after being forced to live on reserves or fringe camps for years in order to maintain a connection to their Country, were suddenly forced off them when they were destroyed in the late 1960s (Read, 2008). These events were often traumatic, splitting communities apart. Across South West Queensland fringe camps were bulldozed with community members often dispersed across Queensland and New South Wales. Therefore, although stories often included many positive memories of strong family and community ties, they also included narratives of distress and loss. Through these stories participants engaged in therapeutic yarning that was relevant to the research topic.

Conclusion

In summary, this chapter explored the practical and ethical lessons that I, as a non-Indigenous PhD student, learnt while working in partnership with Aboriginal communities in South West Queensland, Australia. Following colonisation Indigenous Australians have continued to experience marginalisation, lower health, and lower life expectancies than their non-Indigenous counterparts, with culturally inappropriate research methods often perpetuating this.

My research focused on post-contact memorialisation and the influence that this had on the SEWB of Aboriginal people in South West Queensland. The memorialisation projects provided opportunities for participating Aboriginal communities to publicly counter past discriminatory discourses and to increase the social cohesion of their

communities, amongst other outcomes. People experiencing ongoing marginalisation and disempowerment due to past violence are often at heightened risk to the perceived power differentials that can exist in researcher-participant relationships (Askell-Williams et al., 2007; Hewitt, 2007). Thus, fundamental elements of engaging in research with Indigenous communities include the privileging of their voices and community consultation on the methods to be used (Gorman & Toombs, 2009; Laycock et al., 2011a; Leeson et al., 2016).

Communities advised the use of yarning, an Indigenous research method, for the study. Since Indigenous paradigms are relational, researchers must constantly reflect upon whether they have fulfilled their obligations to participants (Bessarab & Ng'andu, 2012; Wilson, 2001). During this research I found that the collaborative yarning phase in particular opened opportunities for me to contribute skills to the communities' ongoing projects in ways that were relevant to the research. This practice was congruent with past research indicating that the quality of the data gathered during yarning is related to the quality of the relationships formed between participants and researchers. Therefore, through community engagement and consultation, and by employing culturally appropriate methods, I was able to conduct research that aimed to empower participants and meet my obligations to them.

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11

"Greetings from Nanning and Qinzhou!": Student Reflections on an Australian University Study Tour to China as an Experience of Critical Interculturality

Mike Danaher

Abstract University students' international study tours vary widely in intent, duration, effect and meaningfulness. The understandings enabled by critical interculturality (Dervin, *Critical Interculturality: Lectures and Notes*. Newcastle upon Tyne, UK: Cambridge Scholars Publishing, 2017; Murphy-Lejeune, An experience of interculturality: Student travellers abroad. In G. Alred, M. Byram, & M. Fleming (Eds.), *Intercultural experience and education* (pp. 101–113). Sydney, NSW: Multilingual Matters, 2003) can contribute significantly to gleaning further insights into such study tours as potential sites of educational border crossings that can facilitate genuine and enduring learning transformations. This chapter deploys the research method of thematic analysis to explore the

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reflections by a group of Australian university students on their study tour experience to China in November 2018. This analysis demonstrates both the affordances and the limitations of university study tours abroad in disrupting existing intercultural stereotypes, thereby creating possibilities for the educational margins related to intercultural otherness to be traversed by critically intercultural insights, and for intercultural voices to be communicated and articulated.

Introduction

An increasing emphasis on university internationalisation, global citizenship education and outbound mobility experiences has seen international study travel become a key staple of tertiary education with positive experiential learning outcomes (Hall et al., 2016; Williams & Best, 2014). As a result, the higher education system has become increasingly globalised (Zheng, Herawati, & Saneewong, 2019). Globalisation and its driving forces have led to attempts by both scholars and practitioners to deepen our understandings of people's abilities and strategies to act and interact with others in global, diverse and complex environments (Pylväs & Nokelainen, 2018).

It was in this context that I co-lead a two-week study tour to southeast China in November 2018 with my colleague and 12 students who were undertaking various degrees at Central Queensland University (CQU), Australia. The average age of the students was 33. The purpose of the study tour was to facilitate a cultural awareness learning experience for the students. The tour visited Guangzhou, Nanning and Qinzhou. We also interacted with staff members and students at two universities, a school and a vocational education and training centre. An important feature of the tour was the buddy system, whereby a number of Chinese students of Guangxi University were buddied up with the CQU students, and following formal introductions they spent several days and

evenings together visiting places, dining, conversing and generally interacting.

The research presented in this chapter explored how intercultural competence was enhanced for the students participating in this study tour. Intercultural competence refers to behaving and communicating effectively and appropriately within another culture to achieve one's goals (Spitzberg & Changnon, 2009). The understandings afforded by critical interculturality (Dervin, 2017; Murphy-Lejeune, 2003) can contribute insights into how such short-term study tours can facilitate genuine and enduring learning transformations (Hall et al., 2016), although it is acknowledged that there are limitations of this approach in relation to short-term study tours. The chapter uses the concept of critical interculturality to understand better how students can enhance their learning about the culture of the country that they visited as well as their own culture—in other words, how they can enhance their intercultural competence.

The research reported here deployed the method of thematic analysis to explore the CQU students' selected reflections on their experiences in China. The chapter firstly discusses critical interculturality as a conceptual framework for this study, and then explains the research method employed. The analysis of student reflections is then presented, followed by a conclusion. The significance of this analysis lies in highlighting the capacity of critical interculturality to communicate and articulate otherwise unheard voices from researching within the educational margins located in the interstices between cultures—in this case, between Australia and mainland and urban China.

The Critical Interculturality Conceptual Framework

Interculturality is more than just learning about other cultures. It refers to interactions between representatives of different cultures; in other words, communication and mutual understanding of one another's cultures is key to intercultural learning (Dervin, 2017). Interculturality

describes a set of multifaceted processes of interactions through which relations between different cultures are constructed, enabling individuals to forge links between cultures based on equity and mutual respect—that is, to become interculturally competent. Intercultural competence is the ability to experience the culture of another person, to be open-minded, interested and curious, and to function effectively across cultures (Byram, 2003).

To be interculturally competent, individuals must understand the social customs and systems of the host culture (Zheng et al., 2019). Chen (1989) asserted that there are four dimensions of intercultural competence: personal attributes; communication skills; psychological adaptation and cultural awareness. The personal attributes dimension refers to a person's ability to know herself or himself, while the communication skills dimension includes the ability to communicate both verbally and non-verbally. The psychological adaptation dimension refers to a person's ability to handle psychological feelings such as frustration, stress and alienation in a new environment. Finally, the cultural awareness dimension describes a person's understanding of how environment shapes personal thinking. According to Dervin (2017), critical interculturality is a never-ending process of ideological struggle against solid identities, unfair power differentials, discrimination and hurtful (and often disguised) discourses of nationalism, ethnocentrism and racism. Michel Foucault reminded us that "a critique is a matter of pointing out [on]what kinds of assumptions, what kinds of familiar, unchallenged, unconsidered modes of thought, the practices that we accept, rest" (Foucault, as cited in Dervin, 2017, p. 7).

From the perspective of this chapter, critical interculturality requires simultaneous attentiveness to at least two parallel processes. At one level, the seemingly superficial of everyday interactions takes on a new meaning when those interactions take place in an unfamiliar cultural environment. At another level, otherwise latent assumptions and values can be brought to the surface if prompted by the vicissitudes of new sites of meaning-making, such as in the same unfamiliar cultural environment. In other words, critical interculturality contains at least the potential to communicate and articulate previously unheard voices that are at risk of

being marginalised by the stereotypes that sometimes accompany different cultures' understandings of one another.

The Thematic Analysis Research Method

Using the concept of critical interculturality (Dervin, 2017), the research reported in this chapter explored the participating CQU students' preconceptions, biases and stereotypes about China and its people, their formative experiences in China and their post-study tour reflections (how did the students' views change?). I investigated these questions through a thematic analysis of their two assessment pieces, which were part of the tour. Firstly, "People, Culture and Place of Guangxi in My Eyes" asked students to choose ten photographs that they had taken on the tour, and to provide a reflective commentary on each photograph to present an insight into China's culture. These reflections were framed by what, where, when and why questions. The theme of the photographs could be people, activity, place or anything that students were interested in or anything that surprised them. Secondly, a reflective essay of about 2000 words asked students to analyse and reflect critically on any of their experiences that challenged their previous thinking about China, and that enhanced their own intercultural competence through new understandings and appreciations. This second assessment piece provided an opportunity for students to be more self-reflective, and to probe more deeply into their intercultural learning. What was influencing their observations, and how was their intercultural competence being enhanced or stifled? What did they learn about themselves?

In undertaking these assessment tasks, students were inevitably comparing Chinese culture with their own culture. When we compare cultures, we are influenced by our ideologies—for instance, ethnocentrism, the idea that often our ways are better than their ways (Dervin, 2017, p. 14). Comparing means pointing out the differences and similarities, but often people identify only what is different because it is easier to notice difference, and people need to be trained to work within the continuum of similarity and difference in order to become better at intercultural competence (Dervin, 2017, p. 14). Focusing on differences all the

time can create false boundaries, and suggest that there are no commonalities (Dervin, 2017, p. 14). We also make explicit, implicit and moralistic assumptions and judgements when we compare cultures (Dervin, 2017, p. 15). Intercultural competence is "about '*becoming aware of, recognizing, pushing through, presenting/defending, and questioning … assumptions about one's identity or identification, and diverse diversity*'" (Dervin, 2017, p. 18; *emphasis in original*). From this perspective, how did the students modify their thinking and behaviour in order to be more culturally sensitive as a consequence of participating in the study tour? Relatedly, how were otherwise marginalised and silenced voices enabled to be communicated and articulated by the application of critical interculturality?

Data Analysis of Students' Reflections

This section of the chapter discusses the reflections of some of the participating students, looking at each assessment piece in turn. I was interested in how these students critiqued their reflections on the Chinese culture that they experienced. The themes that emerged from their reflections included environment, community and social connectedness, economic growth and loss of cultural heritage, ethnicity, food culture, traffic problems and the effects of communism on freedoms. (Please note that all students' names in this chapter are pseudonyms.)

People, Culture and Place of Guangxi in My Eyes

Tracey

Tracey was surprised to see pollution and litter in the grounds of a university, and she wrote that such litter would not be tolerated in an Australian university. Superficial and subjective comparisons were being made by Tracey between the two countries and the two cultures, based largely on what she saw as different, not on what was similar. The litter that she photographed was on the very edge of the university grounds, but she implied that it was rife throughout the university. From a critical

interculturality perspective, students need to be encouraged to be more critical of what they see, which means undertaking some background reading into the subject matter. They should also be encouraged to ask questions to the Chinese people in respectful ways, in order to find explanations for what they see in order to enhance their intercultural competence. Chen (1989) pointed to this ability to communicate about issues in the host country as another dimension of intercultural competence.

Mark

Mark admired seeing elderly Chinese people practising sports, playing musical instruments or playing games in public spaces such as parks, because this is not a common sight in Australia. This was observed by more than one student, and spoke to the communal nature of Chinese culture where activities in public spaces are normal. This also demonstrated an aspiration to adopt certain cultural practices for one's own country. Mark noted the strong sense of community that existed amongst these people. He wrote that it was an example of filial piety, whereby the elderly people were respected, as was evidenced by being allowed to practise these hobbies in public spaces. He also admired the communal style of eating in China, with each person taking small portions from a shared dish. He wrote that this way of dining created an inclusive and welcoming atmosphere for everyone involved. Mark's observations revealed cultural respect, which is part of intercultural competence, and which highlights an attentiveness to the voices associated with conducting previously unknown cultural practices.

Stacey

Unusually, Stacey tended to identify similarities, rather than only differences, between the Chinese culture and her own. For instance, she noted that the custom of giving young children dolls is common to most cultures. She noted also the similarity between games in China and Australia. Even if they are regarded as traditional games in certain provinces of

China, Stacey wrote that one could still identify a similar version of the game in another country. She stated that the traditional Chinese wedding that we attended had many similarities with weddings in Australia such as: one of the families hosts the reception; the bride and groom share a huge meal with friends and family members; and the tables are arranged and decorated in a similar way, with gifts and alcohol for the guests on each table. To look beyond differences to similarities is a little harder to do, but is evidence of taking time to absorb the culture more and to break down the boundaries that exist along the margins between cultures. This is a crucial component of achieving intercultural competence (Dervin, 2017).

Karen

From some of the sights that Karen saw, she wondered if the Chinese had a crisis of identity. She pondered whether the Chinese were becoming too Westernised in their race to become an economic super power. These comments were prompted by her observations of buildings, clothes, toys and mannerisms as being Western-like. This spoke to her misconception that consumerism is a Western construct. Her observations of a primary school with slogans of "Prosperity, democracy, justice and rule of law" prompted her explanation that these were in fact the mottos of the Communist government eager to maintain their own rule of law, and to propel their country into economic prosperity. She observed that there was a lot of social connectedness in China despite the huge population, and that this could be a lesson for other cultures.

In analysing their ten selected photographs from the study tour for the "People, Culture and Place of Guangxi in My Eyes" assignment, Tracey, Mark, Stacey and Karen demonstrated in varied ways their developing attentiveness to one or more of Chen's (1989) asserted four dimensions of intercultural competence: personal attributes; communication skills; psychological adaptation and cultural awareness. For example, Stacey's emphasis on the similarities between Chinese and Australian cultures betokened a growing cultural awareness. At the same time, the students' analyses revealed many of the initial and superficial misunderstandings

that reinforced Dervin (2017)'s insight that critical interculturality is not easy or inevitable, and that, for instance, ethnocentrism is often resistant to change and transformation. This finding in turn highlights both the possibilities and the difficulties in communicating and articulating voices that are otherwise silenced in the margins between cultures.

Reflective Essays

This subsection analyses a number of reflective essays where the participating CQU students had the opportunity to probe more deeply into some specific aspects of their cultural exchange experience. Some students critiqued their own misconceptions about China, and reflected on their personal growth and their developing intercultural competence as a result. This assessment piece also inspired the students to think more deeply about China's place in the world.

Tracey

Tracey discussed the culture shock that she experienced while in China, and also how the study tour gave her the opportunity to enhance her interpersonal communication skills, gain a new understanding of her own personal culture and values and grow as a person. Overall, she found the tour challenging at times, but she wrote that it made her a better person by improving her understanding of how different cultures can be interpreted through different cultural lenses. Tracey admitted that she had many preconceived ideas and biases about what China and its people were going to be like. By reflecting on these, she was able to strengthen her respect of other cultures.

Based on Tracey's learnings during her time in China and subsequently, she wrote that she would behave differently if she went back to China. Firstly, she would not be so quick to judge the Chinese people based on the somewhat poor quality and uncleanliness of their buildings and open spaces. She realised now that this was not a reflection of the people, but rather a reflection of many years of economic and political turmoil.

Furthermore, despite feeling that she was generally polite and courteous towards the Chinese hosts for the duration of the study tour, she believed that she can still improve on this. This was due to the fact that on a number of occasions she felt frustrated by the communication barrier between the Chinese people and herself, resulting in some intercultural miscommunication (Zheng et al., 2019).

Tracey wished that she had learnt some basic Cantonese prior to going on the tour, as it would have been useful in the early days. In future, she would try not to become as frustrated by the communication barrier, again referring to Chen's (1989) psychological adaptation dimension, one of the dimensions of achieving intercultural competence. She was also better placed to interact with Chinese people in Australia because she had a better understanding of, and appreciation for, their culture, including their social and professional behaviours and customs. She felt that this would be a great help to her, as the town in which she lived had a significant population of Chinese nationals, many of whom were there on seasonal working visas or as backpackers. She was also confident that she could pass her knowledge and skills onto people in both her professional and personal lives, so as to help to educate them about how to interact more effectively with our Asian neighbours. This demonstrated that, even from a short time living abroad, students can still develop a deeper sense of who they are (Murphy-Lejeune, 2003).

Mark

Mark had heard lots about China through experiences with friends, the media and popular culture. He became curious about looking for examples of the "Old China" and "New China" co-existing as a form of biculturalism (Byram, 2003). From what Mark observed about respect for elders, he was able to think more deeply about Confucianism, and more particularly about the concept of filial piety. Further research on this topic led to Mark's discover that the concept of filial piety in Chinese culture not only applied to showing respect for one's elders but also encompassed and influenced nearly all aspects of Chinese culture. Filial piety was and still is a value based on strict principles of hierarchy,

obligation and obedience. That Mark picked up on this demonstrated learning about a core cultural value, which took him a long way to understanding Chinese culture more fully. Mark embraced these differences, thereby reflecting a form of intercultural competence.

The experience at the Guangxi University of Nationalities, meeting different students from ethnic minorities, noticing the ways that they shared and valued their differences and individualities, and observing how they were able to exist harmoniously within the university and within the country all had a profound effect on Mark. When he recalled this part of the tour, he was left with a feeling of respect and admiration.

A brief period of spending time with students and teachers at Guangxi University allowed Mark to make some lifelong bonds. Benefitting from the buddy system that we set up with Guangxi University, he was able to engage in conversations with students about their lives, their past, their childhood, their upbringings, their parents, their schools, their university, their religious and political views and their dreams for the future. This was personally a unique and powerful experience for him. It was interesting and unfamiliar to be in a position where he was able to meet local guides, who were at a similar stage of life (studying at university) to him, and to spend whole days exploring the city and learning from one another. To be able to see an interesting site or artefact, and to have someone explain its significance or purpose, and then to be able to share his opinions or a similar example from his own culture, was a worthwhile learning experience for Mark. The Chinese students with whom he engaged were experiencing similar pressures in their lives: the pressures to perform well in university, have a good career, get married, start a family and so on. It was at moments like his time at Guangxi University that made him feel connected to humanity as whole. Mark noted that, although we are in many ways different, many of the aspects of our lives are similar, and this realisation breaks down barriers.

Stacey

For Stacey, the tour to China was also eye-opening. She had never been overseas before, nor had much experience with Chinese people and their

culture. In her reflections, she highlighted learning about the 56 officially recognised ethnic minorities, trying local foods and experiencing "the real China" by exploring the city on foot and by utilising the country's well-designed and efficient rail network. A couple of aspects stood out and challenged her preconceptions and beliefs: firstly, the drive and independence of the youth of China; and secondly, the cleanliness of China and their commitment towards sustainability. Clearly, her knowledge of China changed, and she also gained more respect for the Chinese people.

Through her meeting and talking with many of the students, two themes that became clear to Stacey were, firstly, how fortunate people in Australia are and, secondly, how important it was that Australians had freedom of choice. One of the things that she took for granted before going to China was the freedom to study what she wanted. One young lady in China told her that she had to gain a degree in accounting just to acquire an entry level job. This contrasted with her own situation where she had the choice to study and work in the creative arts field. Having returned to Australia, Stacey found herself far more appreciative of these choices that she had previously taken for granted. We made the tour for the students fairly relaxed with a lot of time spent with their Chinese buddies, and this provided a good opportunity to ask questions and to engage with them.

The China experience also highlighted to Stacey how Australia is a more low-key and relaxed country, differing completely in the styles of learning and education. In Australia, she wrote that students were expected to be active participants, and to think critically and to evaluate knowledge. Students could question their teachers and were encouraged to do so. Australians also enjoyed an often underappreciated freedom with the ease of access to information. From her observations, this differed greatly in China, where learning was more passive. Listening to the teacher was expected, whilst questioning or challenging a point of view was frowned upon. What was significant in Stacey's reflections was the learning that she undertook and resisting unfair power differentials and tendencies for discrimination, thereby reflecting a key dimension of Dervin's (2017) conceptualisation of critical interculturality.

Conclusion

Contemporary cultures are complex phenomena and exercise profound influence on the individuals who constitute them, and also on those who encounter them. Similarly, intercultural interactions can be opportunities for genuine and sustained learning, yet they can also reinforce inaccurate stereotypes whose effect is to silence diverse voices, and to position the margins that exist between cultures as sites of incomprehension and misinformation.

The research project reported in this chapter analysed two sets of reflections by selected CQU student participants in a study tour to mainland China in November 2018. A number of different views of China's culture were presented, as well as statements about the students' changed views and individual growth. Most students compared Australia with China from the point of view of difference, and were often surprised by aspects of that difference. Sometimes they were initially critical of Chinese culture, placing it in an inferior position to their own. On the other hand, they also expressed a sense of admiration for some cultural aspects, and they identified practices from which Australians can learn. Looking at the student reflections through the discourse of critical interculturality (Dervin, 2017), it can be concluded that this short-term study tour made a contribution to enhancing the participants' intercultural competence (Chen, 1989) and that critical interculturality is a productive concept from which to explore these aspects.

This analysis also identified areas where the tour could be improved. One recommendation for such tours going forward is that it would be helpful if there were a series of pre-departure workshops. In these workshops, students could read articles about intercultural competence and critical interculturality, and then discuss their understandings with their peers and lecturers. Pedagogical support is a necessary component for participating students in order to achieve intercultural competence. Also prior to departure, it could be worthwhile for students to discuss their preconceptions and assumptions about China and its people, as well as what influencing these viewpoints. In this way, students may be better prepared for their visit and become more cognisant of their assumptions,

misconceptions and positions in relation to the Chinese people. They could then be more reflective and reflexive while negotiating culture in China. While in China, students should be encouraged to question what they experienced by undertaking some background reading, then having respectful conversations with native Chinese about their observations to discover explanations for what they experienced and to develop mutual understandings. The buddy system was worthwhile, with both CQU and Chinese university students emphasising how it enriched their intercultural experiences through being able to participate in open, meaningful and respectful conversations, with a simultaneous sharing of laughter and enjoyment. It is acknowledged that the reciprocal intercultural learning by the Chinese hosts and students is important to investigate in future research.

More broadly, the chapter has demonstrated both the affordances and the limitations of this particular university study tour abroad in disrupting existing intercultural stereotypes, thereby creating possibilities for the educational margins related to intercultural otherness to be traversed by critically intercultural insights, and for intercultural voices to be communicated and articulated. These possibilities are fragile and vulnerable, and even more important for being so.

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12

Mobilising Critical Interculturality in Researching Within the Educational Margins: Lessons from Dhofari Women's Experiences of English Language Undergraduate Courses in Oman

Samantha Burns and Patrick Alan Danaher

Abstract This chapter draws on the first-named author's doctoral research with a group of female undergraduate students at Dhofar University in Oman, a Muslim Sultanate in the Middle East. The data corpus included responses to a questionnaire, semi-structured interviews with the students, the first-named author's critically framed observations of the context in her role as the students' English language teacher and her analysis of the late Sultan's royal decrees that framed and implemented

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Omani government policies. The second-named author contributed the chapter's conceptual framework, which was centred on critical interculturality (Dervin, *Interculturality in education: A theoretical and methodological toolkit*. Basingstoke, UK: Palgrave Pivot/Palgrave Macmillan, 2016; *Critical interculturality: Lectures and notes*. Newcastle upon Tyne, UK: Cambridge Scholars Publishing, 2017) as a vehicle for generating new and potentially transformative approaches to researching within the educational margins. These approaches centre on ethical and rigorous contestations of cultural essentialism and hegemony, and on resisting strategies of exclusion and othering.

Keywords Critical interculturality • Dhofar University • Female undergraduate students • Oman • Sultan Qaboos bin Said

Introduction

Although women constitute half the human population, their circumstances and conditions vary considerably across place and time, ranging from figures of influence and power to victims of systematic abuse and marginalisation. From this perspective, women as learners within the educational margins (see e.g. Aikman & Robinson-Pant, 2019; Jackson, 2004; Lee & Kim, 2018) resist categorical homogenisation and conceptual essentialism, exhibiting instead contextualised heterogeneity and situated diversity of aspirations and achievements.

This chapter explores one specific manifestation of women's experiences as situatedly marginalised learners in a particular place and time: a group of female undergraduate students at Dhofar University in Oman, a Muslim Sultanate in the Middle East, who were the participants in the first-named author's doctoral study (see also Burns, Coombes, Danaher, & Midgley, 2014). The focus here is on demonstrating how the concept of critical interculturality (Dervin, 2016, 2017) was effective in analysing the participants' voices, thereby illuminating wider issues pertaining to education research, marginalisation and vocality.

The chapter consists of the following four sections:

- The Omani background and context
- The first-named author's doctoral study
- The chapter's conceptual framework
- Selected data analysis.

The Omani Background and Context

Oman is a country located in the Middle East, at the mouth of the Persian Gulf and with its coastline facing the Arabian Sea, and sharing land borders with the United Arab Emirates, Saudi Arabia and Yemen. Prior to 1970, Oman was a closed Muslim Sultanate (Petersen, 2016). It was not possible for tourists to enter, or for nationals to leave and expect to be able to return. Money from oil was beginning to flow, but there was no evidence of this being used to improve the infrastructure of the country or the lives of its people. There were seven kilometres of roads throughout the country, three schools for boys for basic and Koranic studies in mosques and no government hospitals. It was a divided, tribal nation, with the southernmost region, Dhofar, involved in conflict as communists from Yemen were fighting for control.

To see Oman today, a modern, technologically advanced society, one marvels at the progress made in 50 years. The country now has 32 colleges and universities, 59 hospitals and 897 medical centres, and a comprehensive road system that connects all major areas of the nation. The force behind this development was the recently deceased ruler, Sultan Qaboos bin Said. As well as bringing the country into the twenty-first century, he united what was once "Muscat and the Sultanate of Oman" into a population unified behind the name "the Sultanate of Oman".

However, Oman remains a patriarchal, Islamic culture with distinctive gender roles. In addition, Omani traditions are valued and passed down through the generations. This confluence of tradition and tribalism on the one hand and the influence of globalisation and modernity on the other hand created a particular context in which the study reported here was conducted.

The First-Named Author's Doctoral Study

The Participants

The participants in the study were the first generation in their families to attend university. In a male-dominant society, this opportunity afforded the women alternatives to the traditional life patterns of remaining at home to care for the children and the household. As such, these individuals were sailing in uncharted territory as they sought a path between strong cultural traditions and modern educational ways of being.

Although all the participants were from Dhofar, Arabic was a second language to some of these women, and it was not until they entered school that they began to use Arabic. In some of these cases, their mother tongue was Mahri, Jabbali or Shahri that has no written language, so the concept of reading was introduced at school. In fact, English was a third or fourth language for some participants.

All the women were between 20 and 35 years of age. Some were already mothers; some were single. Some came from the mountains, and some from the city or the plains, yet all had a common culture, a love of Islam and a respect for their traditions.

Data Collection

Samantha began collecting data with a questionnaire sent to over 100 former and current female students at the university. From the responses, she chose seven women who demonstrated a command of English that would enable her to converse with them, and who had replied with added comments showing an interest in and opinions about the questions provided. It was important that Samantha did not use a translator, as this might have restricted the perspectives that the women were willing to share. Samantha understood the privileged position that she held whereby she was trusted and the women felt safe to speak freely.

After gaining formal ethics approval from the university to carry out the research, Samantha explained the study to the participants, assuring them of anonymity and confidentiality and receiving their signed

acceptance to participate. The next step was to set up semi-structured interviews with the participants. These were recorded and transcribed for analysis.

More broadly, the data corpus for the study included the responses to the questionnaire, Samantha's semi-structured interviews with the seven students, her critically informed observations of the context in her role as the students' English language teacher and her analysis of the late Sultan's royal decrees that framed and implemented Omani government policies.

Data Analysis

Samantha's analysis of the identified elements of this data corpus was animated by the application of her three research questions:

1. To what extent and how had being a university student changed these women's reported perceptions of themselves?
2. In what ways did these women state that university education had affected their role/status in their families? Which factors did these women identify as enabling these changes?
3. To what extent, if any, did these women perceive university education as affecting their lives in the broader contexts of the community and the nation?

Analysis of the data corpus to address these research questions was undertaken by means of applying the principles and procedures of interpretative phenomenological analysis (IPA) (Smith, Flowers, & Larkin, 2009; Smith & Osborn, 2003). This approach explores the participants' lived experiences as well as their perceptions. This is achieved using idiographic and inductive techniques to offer insights into how the participants make sense of what they are experiencing (Finlay, 2009). In this study, the application of IPA included the intensive and repeated re-reading of interview transcripts; description of the context of the interview exchange; linguistic comment on how content and meaning were presented; conceptual comment relating to general interaction; the

development of emergent themes; and searching for connections across these themes and then looking for patterns among the data. This rigorous process facilitated the generation and verification of understandings of the participants' insights into their individual lives against the backdrop of the cultural, economic and political shifts in their country, their region and their world.

The Chapter's Conceptual Framework

The second-named author contributed the chapter's conceptual framework, which was focused on critical interculturality (Dervin, 2016, 2017) as a vehicle for generating new and potentially transformative approaches to researching within the educational borders, and also for enhancing strategies for communicating and articulating diverse voices.

With characteristic insight mixed with humour, Dervin (2017) likened "*the Sampo*, … [an] element of Finnish mythology" (p. 1; *italics in original*), to "the 'intercultural', [which] is often of indeterminate type [and] which we hope can bring good fortune, especially in the fields of education and communication" (p. 1). Against that backdrop, he defined critical interculturality:

> … as a never-ending process of ideological struggle against solid identities, unfair power differentials, discrimination and hurtful (and often disguised) discourses of (banal) nationalism, ethnocentrism, racism and other forms of -ism. Critical interculturality is also about the *now* and *then* of interaction, beyond generalizations of contexts and interlocutors. (p. 1; *italics in original*)

At the same time, it is vital to note Dervin's ambivalence about the notion of interculturality, derived partly from his extended experience of its conceptual complexity and its difficulty in being empirically observed and analysed. Again somewhat tongue-in-cheek, Dervin (2016) asserted that "I am not sure what interculturality means and refers to today, or whom it includes and excludes" (Chap. 1). Crucially, Dervin (2016) contended that "it is we who decide what is intercultural and what is not"

(Chap. 1)—an invitation that we take up in the following section of this chapter. Similarly, Dervin (2016) argued that:

> Culture and the concepts to follow do not exist as such. They have no agency; they are not palpable. One cannot meet a culture but people who (are made to) represent it—or rather represent imaginaries and representations of it. (Chap. 2)

More broadly, Dervin's seminal work in this scholarly field demonstrates at once the breadth and the depth of critical interculturality and its significant synergies with multiple manifestations of researching within the educational margins. These synergies traverse theoretical and practical concerns with culture, identity, globalisation, the other and othering, human rights, intercultural competences and social (in)justice (Dervin, 2016).

From this perspective, culture and interculturality emerge as "messy" and "slippery" concepts that elude easy definition and straightforward analysis—as Dervin (2016) noted, "interculturality tends to be polysemic, fictional, and empty at the same time, conveniently meaning either too much or too little" (Chap. 1). On the other hand, culture and intercultural interactions undoubtedly generate profound effects on multiple individuals and communities as they are mobilised by different interest groups for varied purposes. In particular, as we elaborate below, we see critical interculturality as affording important insights into the possibilities for ethical and rigorous contestations of cultural essentialism and hegemony, and for strategies of resisting and subverting exclusion and othering.

Selected Data Analysis

The analysis of selected data from the first-named author's doctoral study presented in this section of the chapter needs to be understood by reference to the analytical framework that she developed for the study, presented in Fig. 12.1.

Figure 1: **Shifting pathways of human development** based on Bronfenbrenner's (1979) ecological human development model and Greenfield's (2009) sociodemographic prototypes
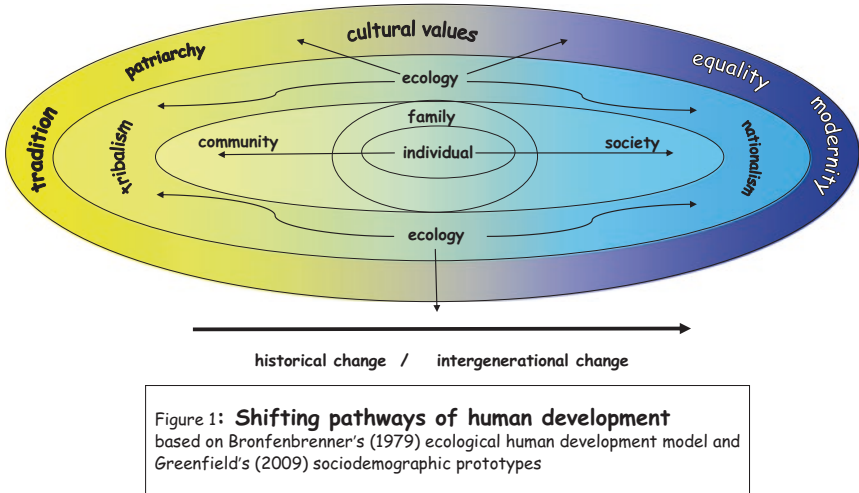
Fig. 12.1 Shifting pathways of human development in Oman

As is noted in Fig. 12.1, this analytical framework synthesised Bronfenbrenner's (1979) ecological human development model and Greenfield's (2009) sociodemographic prototypes. While the comprehensive details of this framework cannot be elucidated here, the broader data analysis on which this section of the chapter draws identified several paired ideas that, rather than functioning as fixed essences or unchanging binaries, highlighted movement back and forth and dynamic tensions as evidenced in the participants' voices. These paired ideas included:

- community—society
- family—individual
- historical change—intergenerational change
- patriarchy—equality
- tradition—modernity
- tribalism—nationalism

with changes and constants in the participants' separate and shared ecologies emphasising the fluidity that was strikingly evident in their identity work.

These paired ideas, and the associated dynamic tensions for the participants and their families, were encapsulated in the late Sultan's introduction of Omani Women's National Day in 2007 to promote national goals for promoting women, by ensuring gender equality in law, and by educating the Omani public about the value and importance of women in nation building. Shehadeh (2010) provided examples of Omani women in various positions of responsibility, and discussed the multiple roles that such women play as "wives, mothers, employees and social changers" (n.p.) (see also Al Hasani, 2015). Shehadeh noted as well that Omani women would not have had these opportunities without support from the authorities, and he quoted Article 12 of the Basic Law of the State: "justice, equality and equal opportunities between Omanis are pillars of the Society and are guaranteed by the State" (Sultan Qaboos, 1996).

One example of the dynamic tensions accompanying the participants' identity work against the broader backdrop of these nationwide changes related to contradictory expectations of young women being the first members of their families to enter Dhofar University. On the one hand, this access to university education accorded with the nation building that occurred after 1970, and with the official discourse of the promotion of women's equality noted above. On the other hand, female students who showed their uncovered faces to young men from their villages brought shame to their families and distress to the students, as well as a father's disapproval of his daughter's confidence in presenting in front of a mixed gender class, rather than protecting her modesty. Data from the students showed their grandmothers', and at times their mothers', concerns that their daughters' marriages might be under threat should they continue with their studies.

More specifically, each participant provided insights into the different opinions of family members with regard to her attending university in Dhofar. The majority of participants reported that their fathers and grandfathers, despite initial reservations in some cases, were proud of the role that they were playing in the development of the country, as well as within the family in relation to improving opportunities for the children:

My father say[s], "Take your time. If you have any project, if you have anything, if you cannot do this work, I will help you. If you don't have

time, I will give you anything that—maybe you are busy, I will do something. I will do another work that you have it to do this [important work] also." (Participant 1)

By contrast, the participants' mothers and grandmothers were often concerned about how the multiple roles operating in the domestic environment would be carried out: "My mother says, 'Just—you have to do this work. If you finish, I want you to do another work'" (Participant 1).

A second dynamic tension was evidenced when participants expressed their awareness of both the scale and the significance of the changes to Omani women's roles that the late Sultan was advocating. In doing so, they articulated support for as well as resistance to these changes within their own families. Participant 3 synthesised these divergent perspectives both powerfully and poignantly, as follows:

[The] Sultan, he want[s] to improve the country. … Women in Oman before cannot have any experience. Just they do something without understanding that [they] have [received] from their mother or their father or their grandmother, yes. But now they study to do something, to take something—they change. Mother[s] all must—women in Oman, like mother[s], can … change the life. Yes, women in Oman also can, yes, can be a mother of [Oman], to be changed.

Similarly, Participant 4 linked these profound sociocultural shifts in Oman with the material question of the different ages at which women in different generations of her family had become married. Her grandmother was "Seven … years old" when she married; her mother married at the age of "14"; and she was "20" when she married. She likened these demographic changes to a "Step by step" process of modernisation, and she extrapolated that her daughters might be "25 and 26, [something] like that" when they married.

A third example of the dynamic tensions attending the participants' identity work was concerned with the responsibility for both work and family care falling on the woman's shoulders. Husbands, mothers, grandmothers and the participants themselves saw this dual role of earning an income and taking care of the household and children as the woman's domain. According to Participant 5:

Because that's in our culture, that women should just stay at home and just take care of children, and the men should work and they would take care of the family, and they would earn money to feed their families.

Participant 5 distilled the following rationale for current changes to these traditionally gendered roles: "Because of [national] development first, and because His Majesty [has] made opportunit[ies] for women to work, and he say[s], 'Make people [be able to access] more education [so] that women should work and they should go to schools'". Participant 7 echoed this identification of Sultan Qaboos's foundational national leadership in relation to the education of Omani women:

He said one word; he said at the beginning where people cannot accept the education and people who—at that time, it was so dark here. So he said, "We will learn; even under the tree, we will learn." He opened the schools; the schools [were initially] for boys only—the rich boys also. He opened schools. He loved everything. So, because of that, we love him. He change[d] our life for the best. Also the families they change[d].

At the same time, Participant 5 communicated her understanding that the traditionally gendered roles were likely to persist in the home, thereby placing greater responsibility on Omani women:

If she can manage her time, … the effect will not be negative; it will be positive. If she can manage her time for [her] family and for her job, and balance between her family and [her] job, that will be fine. I think so.

For Participant 2, someone who was able to attain this balance "is [a] good woman and she is clever":

I think … I will do like my mother—she take[s] care about us, and she work[s] at the same time. So I will divide my time—time for my children, and time for my job. So my job, I do that in my [workplace], and in my house. I am just a woman like any woman Omani. She has children to care about.

In a series of observations, Participant 6 explored significant differences between her friends' and her experiences in Salalah, the capital city in Dhofar, and those of their counterparts in Muscat, the national capital. These differences accentuated striking divergences within Omani society, and constituted a timely reminder that Oman is far from being a monoculture, and that the participants' experiences of changes centred on their English language undergraduate courses were heterogeneous and evoked complex and sometimes contradictory responses on their part and on the parts of their family members.

Participant 6 began this set of reflections by observing the noteworthy change that now her family members "ask me if they [want me] to give them some advice". Previously, "they [didn't] trust my opinion that much [because] our society is not that open-minded". "[Now] they trust me [a lot], because they know that I [spend time] here [at the university] … sometimes eight or nine hours [each day]. … Before they … didn't leave me to … spend all my time alone. But now, of course."

In addition to enhanced trust by her family members, Participant 6 identified other changes in how those family members perceived her now: "… they look at me as [being a] responsible girl. [Furthermore,] [t]hey must ask first, 'Would you like to do that?' … because they know that I have my opinion now. I have [a] stronger personality."

This greater trust and ascription of responsibility were accompanied by another profound shift in Participant 6's family dynamics: "my mum now, and my dad also, they felt that they are proud of their daughter. I mean, 'She's working. She has a good job. She's doing her Masters.'"

In relation to the differences between Salalah and Muscat noted above, Participant 6 stated baldly that, as well as feeling proud of their daughter, her parents "were worried, because it's a new atmosphere" at the University: "I didn't study with boys before, and it's a big problem here in Salalah". She elaborated: "Because, you know, we cover our face[s]. We cover our bod[ies]. … [I]t's a taboo [to be] with men in the same place. But, … after two months, three months, it became okay, [and it is] common now." Moreover, "Here in Salalah we must cover our face[s]. We must cover our bod[ies]. So no one can see you except if he's your brother or your cousin sometimes. But in Muscat no. It's the opposite."

More widely, Participant 6 differentiated explicitly between locally based customs that varied from place to place and over time on the one hand, and perceived formal religious requirements on the other hand. From this perspective she analysed the dress code for female Omanis in Salalah as follows:

> It's from years [ago]. You can say it's [been] … one hundred years like this. It's a norm. It's not coming from Islam, no. Islam [doesn't] tell us to cover all of these things. Just cover your hair and do whatever you want to do, unless … [those] things … would harm your behaviour. But, you know, society sometimes forces you to do something [in] the name of Islam.

Participant 7 proffered a somewhat different analysis of the complex relationship between religion and social change in Oman:

> … if you go and search in the society in our religion, you have to learn. You have to learn. If you didn't learn—because the religion supports that, people accept it. People will accept it if it's from the religion. If religion did not allow it, they will say, "No", and they will fight for a long time. But, because they allowed that, they [got] us to study. They allowed us to do it. So I think it depends. Our culture at the beginning [in relation to] girls, "Why is she going?". But people say to them, "Yeah, religion … and the government allowed them [to be educated]".

With regard to the paired ideas portrayed in Fig. 12.1, several of these ideas were canvassed in the selected data analysed in this section of the chapter. For instance, Article 12 of the Basic Law of the State (Sultan Qaboos, 1996) distilled complex moves from patriarchy to equality, while the late Sultan's introduction of Omani Women's National Day in 2007 constituted a decisive bridging between tradition and modernity. Moreover, the participants interpreted both these developments as ongoing shifts between community and society, and between tribalism and nationalism. Furthermore, individual participants varied in their constructions of how these broader changes influenced their respective family and individual relationships, as well as of the interplay between historical change and international change within their specific family and occupational contexts.

In terms of the chapter's conceptual framework, the data analysis presented here corroborated Dervin's (2016) insight that "One cannot meet a culture but people who (are made to) represent it—or rather represent imaginaries and representations of it" (Chap. 2). In diverse ways, each participant contributed to representing such "imaginaries and representations" of Omani culture and society and of the Islamic religion in ways that were meaningful to her. Similarly, this data analysis confirmed Dervin's (2017) characterisation of critical interculturality "as a never-ending process of ideological struggle against social identities, unfair power differentials, discrimination and hurtful (and often disguised) discourses of (banal) nationalism, ethnocentrism, racism and other forms of -ism" (p. 1). The participants' insights and reflections reported here highlighted how complex, contextualised, nuanced and subtle this "process of ideological struggle" is and also how heterogeneous it is even from the perspectives of the seven participants in this study. As we noted also when presenting the chapter's conceptual framework, these findings contributed in turn to operationalising possibilities for ethical and rigorous contestations of cultural essentialism and hegemony, as well as for specific strategies for resisting and subverting exclusion and othering in varied forms, while acknowledging always the material constraints on and limitations of doing so.

More widely, it can be seen from this analysis that mobilising critical interculturality in this way to research within the educational margins affords new understandings of and strategies for communicating and articulating voices within those margins. In particular, this chapter has illustrated starkly the conceptual fluidity and the situated manifestations of gendered discourses and critical interculturality alike. While each of these theoretical resources contributed important insights to this analysis, what emerges equally significantly are the singularity and specificity of Dhofar and Oman as culturally, geographically and historically constituted contexts that helped to frame and constrain the study participants' agential and intelligent engagements with the distinctive opportunities generated by their undergraduate experiences in learning English at Dhofar University.

Conclusion

This chapter has explored the experiences and perceptions of a group of female undergraduate students studying English at Dhofar University in Oman, against the backdrop of significant changes to traditional tribal and patriarchal culture in that nation. Critical interculturality (Dervin, 2016, 2017) has been confirmed as instructive in analysing the participants' voices. At the same time, the lessons arising from that analysis include wider issues pertaining to education research, marginalisation and vocality.

Firstly, the complexity and diversity of the regional, national, community, family and personal contexts, exemplified in the paired ideas elaborated in Fig. 12.1, explain why education research projects resist easy analysis or superficial generalisation. On the contrary, the differences among the participants' responses identified in the preceding section of this chapter underscore the continuing need to remain attentive to the nuances and subtleties of individual variations on aspirations, experiences and insights related to researching educational opportunities and outcomes.

Secondly, marginalisation emerges as a complicated and elusive phenomenon that evokes as many questions as it resolves. One such question revolves around the ethics and utility of identifying certain individuals and groups as "marginalised" (Danaher, 2000). For instance, with regard to academic publications dealing with such individuals and groups, "it behoves the authors to ensure that they do not deploy the discourse of 'marginalization' in ways that actually help to replicate the inequalities that they are seeking to make explicit and to contest" (Danaher, Cook, Danaher, Coombes, & Danaher, 2013, p. 4). This is on the basis that, "unless considerable care is taken, naming practices involved in researching marginalization can serve to perpetuate the apparently different and deficit dimensions of the lived experiences and perceived identities of individual members of particular communities" (Danaher et al., 2013, p. 4). It was for this reason that we referred in the introduction to this chapter to the study participants as "situatedly marginalised learners", given that they would not necessarily identify themselves as

"marginalised", and also given that our analysis has complicated and problematised, rather than homogenised and simplified, these women's educational experiences.

Thirdly and finally, this book's focus on communicating and articulating voices in research projects dealing with learners on the educational margins, in the context of this chapter's account of the Dhofari women's experiences of English language undergraduate courses in Oman, demonstrates that, like marginalisation, vocality is far from being a homogeneous, singular or undifferentiated phenomenon. This was highlighted by the divergences among the participants' reported interactions with their courses and within the posited impact of those interactions on their respective families. Relatedly, in some ways the voices of those family members were as significant as those of the participants, whose utterances in the semi-structured interviews reflected and refracted the varied and in some cases contradictory perspectives of different generations in a single family.

Overall, then, this particular account of researching cultural differences and intercultural experiences, grounded in Dhofari women's understandings of their English language undergraduate courses, and informed by the concept of critical interculturality (Dervin, 2016, 2017), has much to teach us about learning, teaching and researching within the educational margins beyond the national boundaries of Oman.

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13

Occupational Travellers and Researchers as Educational Border Crossers: Methods for Researching with Australian and British Fairground People

Geoff Danaher and Patrick Alan Danaher

Abstract The work of occupational Travellers requires them to cross geographical borders regularly, which in turn generates challenges and opportunities for educating their children. Similarly, education scholars researching with occupational Travellers cross axiological, epistemological and ontological borders in striving to research ethically and reciprocally with the research participants in spaces that mainstream cultures position as being on the margins of educational provision.

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This chapter explores and evaluates the methods deployed by the authors in conducting and publishing research with members of the Australian and British fairground communities over several years. These methods centre on issues of rapport, reciprocity and representation, and they include intercultural communication, nuanced vocality and co-authorship where possible. Conceptually, the discussion is framed by an updating of Giroux's (*Border crossings: Cultural workers and the politics of education* [2nd ed.]. New York, NY: Routledge, 2005) provocation around border crossings.

Introduction

At its most generative and transformative, education research might be claimed to yield enduring and significant changes in understandings between researchers and research participants alike. Such changes evoke genuine and lasting learning on the part of all research stakeholders, thereby challenging simultaneously the notions of researchers as impartial and objective observers, and of research participants as passive donors to the researchers' interests without receiving much if anything in return.

A specific instance of these kinds of life-changing developments in researcher–research participant relationships builds on the work of occupational Travellers such as circus and fairground or show communities that requires them to cross geographical borders regularly, which in turn generates challenges and opportunities for educating their children against the backdrop of complex interactions with state education systems. Similarly, education scholars researching with occupational Travellers cross axiological, epistemological and ontological borders in striving to research ethically and reciprocally with the research participants in spaces that mainstream cultures position as being on the margins of educational provision, thereby engaging in their own distinctive forms of educational and occupational mobility.

This chapter explores and evaluates the methods deployed by the authors in conducting and publishing research with members of the

Australian and British fairground communities over several years. These methods centre on issues of rapport, reciprocity and representation, and they include intercultural communication, nuanced vocality and co-authorship where possible as particular strategies of communicating and articulating the voices of learners and educators with whom the authors and their fellow researchers have conducted research within this particular educational margin.

Conceptually, the discussion is framed by an updating of Giroux's (2005) provocation around border crossings. Giroux's work emphasised the multiple ways in which scholars change and shift their trajectories as they engage with variously constituted sites of power and sources of authority. This chapter's updating directed Giroux's provocative ideas towards understanding how those ideas might "work" specifically in the distinctive contexts of occupational Travellers' work and learning, which in turn animated a reimagining of Travellers and researchers alike as educational border crossers.

The chapter is divided into the following four sections:

- Background information about occupational Travellers and their educational experiences
- The chapter's conceptual framework updating Giroux's (2005) notion of border crossings
- Occupational Travellers and the researchers who work with them understood as educational border crossers
- The authors' and their fellow researchers' strategies for researching ethically and reciprocally within this particular educational margin.

Occupational Travellers and Their Educational Experiences

In this chapter, we use the term "occupational Travellers" to refer to communities whose paid work requires them to move physical locations and to traverse intervening territories with diverse patterns of mobility for varying periods of time. We employ the capital "T" with "Travellers" to

denote the status of some of these communities as ethnic minorities such as English and Irish Travellers (see also Kenny & Danaher, 2009). Various descriptors—some with neutral valence and others with negative valence assigned by the dominant culture—are applied to these communities, including "itinerant", "migrant", "mobile" and "nomadic".

The kinds of work conducted by occupational Travellers also vary widely (see also Danaher, 2020b). One significant category of such work (while displaying considerable internal diversity) is associated with the nomadic pastoralists who travel with, and care for, different species of animals (Commission on Nomadic Peoples, 2008; Salzman, 2004). Examples of nomadic pastoralists range from cattle herders in Nigeria (Adeoye, 2019) to sea nomads in Indonesia (Dyer, 2016) to transhumant pastoralists in western India (Dyer, 2008).

Another strand of occupationally mobile communities is centred on the seasonal workers who travel and work—sometimes as individuals and sometimes in groups of varying sizes—to provide the manual and semi-automated labour that is vital to particular agricultural industries. A major manifestation of this strand is the migrant workers who move from Central and South America to pick fruit and provide other labour on farms in the United States of America (Holmes, 2013; Loza, 2016). Likewise, there are equivalent mobile communities providing this labour in Australia (Henderson, 2005), Canada (Hennebry, McLaughlin, & Preibisch, 2016), Lebanon (Habib et al., 2016) and the Mediterranean (Corrado, de Castro, & Perrotta, 2017).

A different grouping of occupationally mobile communities—and the specific category with whom we are concerned in this chapter—is focused on the owners and workers who provide itinerant forms of entertainment. These entertainment types range from carnivals (Batty, Desyllas, & Duxbury, 2003) to circuses (Natt, Aguiar, & de Pádua Carrieri, 2019) to fairgrounds and showgrounds (Walker, 2015) to travelling shows (Abbott & Seroff, 2007). Within these occupational clusters, groups exhibit considerable diversity. For instance, two distinct types of circuses are those with and without animals (Toulmin, 2018). With regard to fairgrounds and showgrounds, they vary widely in terms of longevity and size (Trowell, 2017), and also of the meanings that they evoke among the people who visit them (Kyle & Chick, 2007). Fairgrounds and showgrounds also

exhibit international variability in relation to business models, cultural histories and social structures, ranging for example from Italian attractionists (Gobbo, 2015) to Venezuelan *parques de atracciones* (Anteliz, Danaher, & Danaher, 2001; Anteliz & Danaher, 2000) .

Building on the reference above to some "Travellers" as identified ethnic communities, occupational mobility exhibits a complex connection with particular Indigenous communities that engaged traditionally in particular kinds of mobility. Sometimes these types of residential mobility have been related to cultural practices, sometimes to occupational needs and sometimes to both. National and continental examples of these communities include Indigenous Australians (Danaher, 2012), Roma in continental Europe (Yildiz & De Genova, 2018), First Nations peoples in Canada (Snyder & Wilson, 2015) and in the United States of America (Cresswell, 2008), as well as globally (Aikau & Corntassel, 2014), and Gypsy Travellers in Great Britain (Marcus, 2019; McCaffery, 2009).

Against the backdrop of these highly differentiated lives of diverse communities of occupational Travellers, the educational experiences of those communities were generally characterised by a fundamental disjuncture between formal schooling on the one hand and the distinctive rhythms and routines of occupational mobility on the other hand (see also Danaher, 2020b; Levinson & Hooley, 2014). This disjuncture resulted from the former's requirement of fixed and place-dependent attendance, whether at a school or at home studying via distance or online education, which was contrasted with the latter's being predicated on regular, albeit diverse, forms of physical movement around geographical areas of varying size. This contrast was distilled succinctly by Evans (1998), specifically with reference to Australian show children, but more widely in relation to the children of occupationally mobile families in many parts of the world:

> Contemporary societies and their attendant bureaucracies and services assume that people have a place, an address where they can be contacted, monitored and "served". Usually children go to the local school and their registration and attendance are monitored to ensure that they receive their rightful amount of schooling. Show children occupy or traverse a territory

rather than a place. … Children are expected to be at school during school hours. How can they do this if their parents and homes move, sometimes hundreds of kilometres every couple of weeks? (p. xii)

Again specifically for the Australian show people, but also again in some ways representatively of other occupationally mobile communities, before a specialised programme for them was created by the Brisbane School of Distance Education (Danaher, 1998a), their children's schooling options were stark, as synthesised by the second-named author (Danaher, 2001):

- sending their children to local schools along the show circuits
- sending their children to boarding schools
- not sending their children to local or boarding schools but instead teaching them correspondence lessons on the show circuits
- coming off the show circuits and finding alternative employment for the duration of their children's education so that the children could attend local schools
- remaining on the show circuits and sending their children to live with relatives and attend local schools
- not sending their children to school at all. (p. 255)

The diversity of the different forms of occupational mobility noted above was paralleled by an equivalent diversity in the schooling systems available to these occupationally mobile communities. For instance, Kenny (1997) was for many years the Principal of a specialist school located in Dublin for Irish Travellers. In England, the Traveller Education Support Services provided support for mainstream classroom teachers to work with itinerant children, and also organised distance education packs for the children when they stopped travelling during the winter months (Danaher, Coombes, & Kiddle, 2007). In Australia, the show people moved from receiving distance education from the Brisbane School of Distance Education (Danaher, 1998a) to establishing their own Queensland School for Travelling Show Children (Danaher, Moriarty, & Danaher, 2006), which was subsequently closed and replaced by the current National School for Travelling Show Children, with mobile

classrooms that accompany the families as they move around their established itineraries (McKinney, 2018). By contrast, even though they were neglected, boarding schools were set up to accommodate the children of generally poor nomadic herder families in Mongolia (Steiner-Khamsi & Stolpe, 2005).

Despite the commitment of children and their families, and the conscientiousness of the teachers, involved in these different forms of schooling provision, and the examples of authentic pedagogical innovations evident in many instances of this provision notwithstanding (Henderson & Danaher, 2012), overall the educational experiences of occupational Travellers are marred by the fundamental disjuncture elaborated above between their distinctive lifestyles and the very different requirements of location-based education systems. This crucial point was articulated poignantly by Dyer (2006):

> To make their way in the contemporary world, nomadic groups are finding that their indigenous modes of education are no longer adequate. All over the world, this has stimulated a search for external educational inputs to support the process of adaptation, both within and beyond pastoralism or hunter-gathering. Yet much of the history of nomadic and formal education reflects an incompatibility between the aspirations of service users and the services that are provided, and underlines the often doubtful relevance of formal education to their lives. Success stories are few and far between, yet the need is often strongly felt. (p. 1)

Border Crossings as a Conceptual Framework

The conceptual framework underpinning this chapter is based on an updating of Giroux's notion of "border crossing" that he articulated in 2005, and that was itself an updated version of his conceptualisation of this notion published originally in 1992. For Giroux, consistently attentive to the politicised landscape in which education systems are enacted, "Borders and border crossing as political and heuristic metaphors still occupy a central, if not more concretized, place in any viable social and education theory". In particular, and in words that resonate powerfully

with the similarly politicised landscape on which occupational Travellers receive and make sense of their educational experiences as explained in the previous section of the chapter:

> … the concept of borders provides a continuing and crucial reference for understanding the co-mingling—sometimes clash—of multiple cultures, languages, literacies, histories, sexualities, and identities. Thinking in terms of borders allows one to critically engage the struggle over those territories, spaces, and contact zones where power operates to either expand or to shrink the distance and connectedness among individuals, groups, and places. In the broader political sense, the concept of borders and border crossing serves to highlight that the goal of politics is transformative of both relations of power as well as public consciousness.

For Giroux (2005), given his highly politicised conceptualisation of borders and border crossings, it was not surprising that, in concert with this conceptualisation, he had moved from focusing on critical pedagogy in the first edition of *Border crossings* (Giroux, 1992) to taking up the notion of public pedagogy, "in which the production, dissemination, and circulation of ideas emerges from the educational force of the entire culture". More specifically:

> Public pedagogy in this sense refers to a powerful ensemble of ideological and institutional forces whose aim is to produce competitive, self-interested individuals vying for their own material and ideological gain. Corporate public pedagogy now largely cancels out or devalues gender, class-specific, and racial injustices of the existing social order by absorbing the democratic impulses and practices of civil society within narrow economic relations. This form of dominant public pedagogy has become an all-encompassing cultural horizon for producing market identities, values, and practices.

Giroux (2005) brought together these two ideas of border crossings and public pedagogy in this way:

> The concept of border crossing not only critiques those borders that confine experience and limit the politics of crossing diverse geographical,

social, cultural, economic, and political borders, it also calls for new ways to forge a public pedagogy capable of connecting the local and the global, the economic sphere and cultural politics, as well as public and higher education and the pressing social demands of the larger society. At stake here is the possibility of imagining and struggling for new forms of civic courage and citizenship that expand the boundaries of a global democracy.

On the one hand, Giroux's (2005) account of borders and border crossings constituted a characteristically provocative and insightful analysis of social systems, including education, particularly through the prism of United States politics and power. On the other hand, that prism, and the associated notion of public pedagogy, did not necessarily provide a sufficiently nuanced and situated understanding of the distinctive and highly differentiated educational experiences of particular communities of occupational Travellers. From this perspective, the "updating" of Giroux's ideas referred to in the abstract for and the introduction to this chapter relates particularly to linking them with, and locating them in, the specific territories—certainly physical, yet also discursive, political, psychological, sociological and spiritual—in which occupational Travellers live their lives, and in which educators and researchers work with them to enact and evaluate certain forms of educational provision. From this perspective, "border crossings" take on an occupational Traveller-specific character that was encapsulated recently by the second-named author of this chapter with regard to:

> … the continuing power of the forces that construct margins and that thereby position some individuals and groups on these margins. That power is manifested in the inhabitants of the margins being characterised as variously different, deficit and deviant—characterisations that those inhabitants are sometimes conditioned into accepting as accurate self-representations. At the same time, these accounts also demonstrate the dynamism and fluidity of specific margins as markers of sociocultural identity and the emergence of alternative discourses about those margins, in so doing confirming the possibility of productive and sustained change in the effects and effectiveness of such margins. (Danaher, 2020a, p. 5)

Occupational Travellers and Researchers as Educational Border Crossers

Having described the historically constructed and highly diverse material contexts in which different communities of occupational Travellers live their lives and earn their livings around the world, and also in which they receive and engage with educational experiences of varying kinds, and having outlined the conceptual framework underpinning the chapter, we turn now to outline and illustrate the proposition of those occupational Travellers and the researchers who work with them alike as educational border crossers. We locate this proposition in our research with Australian and British fairground people (see for example Anteliz, Danaher, & Danaher, 2004; Danaher, 1998a; Danaher et al., 2007).

From this perspective, clearly Australian and British fairground communities exhibit customary, habituated and routine border crossings by virtue of their physical movements as they follow the itineraries (which are relatively extensive in both countries) associated with their respective fairground guilds. These border crossings include the political boundaries signified by states and territories (in Australia) and local authorities and counties (in Great Britain). They involve also traversing the highly ambivalent and complex spaces characterising the local communities for which they provide paid and very popular entertainment. On the one hand, fairground people and the members of those local communities exhibit heightened economic and social interdependence: for instance, the annual shows in Australia attract thousands of patrons, and a significant component of that attraction is provided by fairground ride operators (Danaher, 1998a). On the other hand, there continues to be mutual prejudice and suspicion between the two groups that derive in part from the fairground communities crossing the borders into what at least some of the local townspeople regard as properly their exclusive space (Danaher, 2001, 2010), prompting the lively characterisation by the chapter authors and a fellow researcher of the fairground communities as being seen as "space invaders" in this situation (Danaher, Danaher, & Moriarty, 2003).

Against this backdrop of their regular physical border crossings across political and sociocultural borders, Australian and British fairground

communities demonstrate also their traversing of educational boundaries. This traversing derives from the fundamental disjuncture noted above between the distinctive rhythms and routines that occupational Travellers require in order to enact their particular forms of mobility on the one hand and education systems' predication on learners remaining in one place on the other hand. From this perspective, understanding Australian and British fairground people as educational border crossers entails being attentive to the ways in which they move out of the "different, deficit and deviant" (Danaher, 2020a, p. 5) characteristics assigned to them by education system on account of that disjuncture to the much more agential and proactive roles that leading members of their respective communities have exhibited. Examples of these roles have included the Australian fairground people lobbying government officials to establish a specialised school exclusively for their children (Danaher, 1998a), and instances of very strong and sustained collaborations and partnerships among British fairground families, the local schools attended by their children and the English Traveller Education Support Services (Danaher et al., 2007). These kinds of educational border crossings require commitment and courage by the fairground communities, many of whom find schools alien institutions, and goodwill from the education systems. When they succeed, the effort on all parts is well worthwhile.

Correspondingly, our fellow researchers and we have engaged in distinctive educational border crossings by virtue of working for several years with Australian and British fairground communities and with the teachers and headteachers/principals who have provided formal education to them. In doing so, we have been challenged to reconnect with our previously largely unproblematic understandings of the purposes, character and effects of such education, and we have become increasingly aware of the politicised landscape in which their and our "border crossings" (Giroux, 2005) have occurred. We have also been prompted to problematise our awareness of our own responsibilities and roles as education researchers, moving from an initial assumed but unexplicated position as interested observers to being drawn into a set of networks based on mutual interests and the obligations of reciprocity to interrogating ourselves as potentially engaging in certain kinds of activism on behalf of the

occupationally mobile communities with whom we have worked (see also Danaher, 1998b; Danaher & Danaher, 2008).

This account of the Australian and British fairground families, and of our fellow researchers and ourselves, as separate but interdependent kinds of educational border crossers has been informed by our updating of Giroux's (2005) notion of border crossings. In both cases, the families and the researchers have encountered and engaged with variously constituted sites of power and sources of authority. These encounters and engagements have challenged previously unexamined assumptions about customary educational and research practices that have been found on reflection and through analysis to privilege some perspectives and voices and to disempower others. Yet they have also afforded opportunities, working through diverse collaborations and developing innovative variations on those educational and research practices, to generate material improvements to educational provision for, and the accompanying research about, these occupationally mobile learners. At the same time, these challenges and opportunities have enabled the occupational Travellers and the education researchers alike to interact with highly diverse cultural experiences, and also to create sometimes profoundly influential intercultural learning.

Researching Ethically and Reciprocally Within this Educational Margin

In this final section of this chapter, and drawing on our shared status as educational border crossers with members of occupationally mobile communities, including Australian and British fairground families, we explore some of the strategies that our fellow researchers and we deploy in order to research ethically and reciprocally with the research participants in spaces that are in certain and complex ways positioned as being on the margins of educational provision. In doing so, we seek to demonstrate contextually appropriate and effective ways of helping to communicate and articulate the voices of the research participants and stakeholders who work and learn within this particular educational margin.

Firstly, we have always endeavoured to ensure that we are attentive to the situated affordances of facilitating rapport and reciprocity with, and representation of, these occupationally mobile communities. This attentiveness has included, for instance, explicating and analysing the asserted and actual benefits of the research to the research participants. This attentiveness has entailed also being open to the proposition that the interests of research participants and researchers can differ, and sometimes conflict, between as well as within each group, and to the consequent need to talk and work through these differences and potential conflicts (Anteliz et al., 2001). Relatedly, representation of research participants is simultaneously an analytical, discursive and political process that requires careful navigation among sometimes competing imperatives between participants and researchers (Danaher, 2008).

Secondly, we realise that the strategies that we have employed when researching within this particular educational margin have involved instances of intercultural communication and nuanced vocality. Intercultural communication has been evident when striving to understand distinctive worldviews that derive from specific kinds of cultural contexts, with important implications in turn for understanding diverse educational experiences (Danaher, 2015). Nuanced vocality is evident when the research participants and the researchers explore multiple ways to express their separate and shared aspirations and interests, and to convey the subtleties of meaning attached to particular utterances that might otherwise be taken to evoke only straightforward or superficial meaning.

Thirdly, while this is not always possible or perhaps desirable, we have explored opportunities for co-authorship between research participants and researchers where that co-authorship has been feasible and hopefully mutually beneficial. These co-authored publications have included two articles with the founding Principal of the Queensland School for Travelling Show Children (Fullerton, Danaher, Moriarty, & Danaher, 2004; Fullerton, Moriarty, Danaher, & Danaher, 2005), an article with the then Headteacher of one English Traveller Support Service (Currie & Danaher, 2001) and a co-authored book with the then Headteacher of a different English Traveller Support Service (Danaher et al., 2007). Certainly, when it can occur, co-authorship can represent a deeper and more profound dialogue between the two groups than is often the case in

many education research methods (see also Danaher, Cook, Danaher, Coombes, & Danaher, 2013).

While our interactions with Australian fairground families were more extensive and direct than with their British counterparts, nevertheless we have found with both communities that these specific strategies outlined in this section of the chapter were generally effective in sharing between the research participants and the researchers the respective aspirations, concerns and imperatives of each group. This has assisted each group in its particular itineraries as educational border crossers. It has also contributed to ensuring that our research within this particular educational margin has been as ethical, reciprocal and in some ways empowering as possible. It has helped as well to communicate and articulate the voices of these occupationally mobile communities, thereby supporting the amelioration of any misunderstandings related to learning and researching within this educational margin.

Conclusion

There are multiple instances of education research entailing multiple forms of "border crossings" (Giroux, 2005), often resulting in significant and transformative shifts in the worldviews of research participants and researchers alike. These kinds of border crossings can generate and incorporate equally significant and transformative changes arising from those borders exhibiting axiological, epistemological and ontological dimensions.

Certainly, we acknowledge the broader lessons to be learned from this particular evocation of occupational Travellers and researchers as educational border crossers, focused on the cases of Australian and British fairground people. We see these lessons as including distinctive understandings of cultural differences and intercultural experiences, and as contributing to the broader enterprise of communicating and articulating diverse voices when researching within this particular educational margin.

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Part IV

Researching About Informal Learning with Older Learners: Introduction

Deborah L. Mulligan

The five chapters in the final section of this book provide opportunities to glean a wide range of techniques related to researching about informal learning with older learners. Having moved from examining research practices with children and marginalised youth, to researching about cultural differences and intercultural experiences, it is timely and crucial, in this global age of a rising demographic group of over 60s, to devote a section of the book to older learners. As ever when researching marginalised groups, attention is paid to the specific needs of both the cohort itself and the individuals contained within that cohort. It is essential that we, as researchers, do not fall prey to the current social trope that citizens over the age of 60 have "passed their use by date", and that they offer little to contemporary society in the way of a purposeful contribution to the community in which they live. The spirit of informal and lifelong learning is alive and well in the following chapters, and the participants in the research reported by the chapter authors exhibit a determination to build a better world for their generation as well as those to follow.

Chapter 14 takes the readers to Aotearoa New Zealand and introduces them to a group who practise the timeless craft of quiltmaking and the informal learnings positioned around aspects of collaboration and community practice. Not just an activity for grannies, quiltmaking emerges from the authors' analysis as generating very real benefits of communal endeavour whilst also exploring their praxis of ethnographic inquiry.

Marlyn McInnerney discusses the issues around educational fringe dwellers in remote Queensland, Australia in Chap. 15. Her writing focuses on her position as an insider researcher as she interviews women like herself who live on remote stations in the outback. Their battle for equality of educational opportunities for their geographically isolated children makes for a very thought-provoking read.

As more researchers engage in examining informal and lifelong learning, particularly for those over a certain age, Brian Findsen seeks in Chap. 16 to understand better the dynamics of later-life research into learning/education. He draws on his empirical studies undertaken in Aotearoa, New Zealand, and the West of Scotland to illustrate research issues, especially methodological concerns, related to investigating later-life learning.

The subject of retirement and the older male is discussed in Chap. 17. Deborah L. Mulligan delves into what she terms "the dark geography of retirement" (both voluntary and involuntary), and she discusses the relational links among the concepts of suicide ideation, contributive needs and older men. Mindful of traversing difficult emotional terrain, Deborah relates learnings from her research conducted within male-only organisations located in Southwest and Southeast Queensland, Australia.

Finally in this section, Chap. 18 presents a phenomenological study of older professional American males who experienced involuntary job loss and the manner in which they made meaning of their lives thereafter. Brian Hentz presents his findings and discusses the complex ways in which men cope with this life challenge as they move forward.

14

Unstitching the Fabric of Informal Learning: Researching Collective Quiltmaking in Aotearoa New Zealand

Linda Claire Warner, Pirita Seitamaa-Hakkarainen, and Kai Hakkarainen

Abstract This chapter discusses "doing" educational research with two quilting communities located in Aotearoa New Zealand. The ethnographic inquiry explores the phenomenon of informal learning and teaching as they materialise through the quilters' communal practices. Collective quiltmaking is often marginalised by non-quilters as a "granny" activity bounded by rules, thus restricting creativity. However, far from being fringe dwellers, the quilters reveal the creative chaos, multi-voicedness, and tacit complexities within their practices of "quilting together".

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Building upon sociocultural models of apprenticeship learning, it is necessary to move beyond perceiving quilting communities as stable conservative entities. Rather, the quilters value their leisure activity as an educational pursuit and become border crossers, initiating creative research strategies, which transform their practice, activities, and material objects with the generation of new knowledge.

Keywords Aotearoa New Zealand • Apprenticeship • Ethnographic inquiry • Informal learning • Quiltmaking

Introduction

This chapter focuses on the messy aspects of "doing" educational research with quiltmakers in community-based settings within Aotearoa New Zealand. The ethnographic study explores the organisation of informal learning and teaching to gain an understanding of the collaborative processes involved in "quilting together". Technically, patchwork involves sewing pieces of fabric together; quilting, on the other hand, refers to the stitching of two or more layered textiles to hold them together. However, the terms—"patchwork" and "quilting"—are frequently interchanged, likewise in this chapter, engendering common inference to a quilt or the act of making a quilt. The research aim responds to a variety of contextual issues surrounding the process of informal learning and teaching as it materialises through the quilters' engagement in idiosyncratic community practices: the practices of which are generative of quilting knowledge and vice-versa. Amidst the creative chaos, multi-voicedness, and tacit complexities, the quilters' learning was taken-for-granted being "simply the way things were" (Dickie, 2003, p. 128). Together, the principal researcher (first-named author) and research participants developed educational research strategies to reveal cultural patterns of meaning-making experiences and collective knowledge practices. As a result, the investigation became a two-fold process: research *on* learning and research *as* learning, reinforcing Lave's (2011) contention that ethnographers are apprentices to their own ongoing practices.

Quiltmakers may be viewed as marginalised fringe dwellers. Collective quiltmaking is often stereotyped as a rule-bound, "granny" activity, restricting creativity (Dickie, 2004; Stalp, 2007). Archival documents from Aotearoa New Zealand repositories described patchwork and quilting activities as "keeping our grandmothers out of mischief" ("Women in Print", 1917), while stitching quilts employed "intricate designs that our grandmothers so often loved" ("Quilt Making at Home", 1935). Even the researcher, an experienced quilter, at the beginning of her teaching career in the 1980s was told by a school principal, "Quilting is for old people! Leave it until you're retired." The marginalised identity of a quilter is typically perceived by non-quilters as a little old lady living in a "fuddy-duddy" world, rather than an adventurous 60+ year old who is "tech-savvy". In addition, Statistics New Zealand's (2011) analysis of leisure pursuits listed hobbies as non-productive activities, with handwork and crafts recorded alongside playing card games and collecting stamps (Hancock, 2011). Consequently, the marginalisation of quilting communities is often based on ageism, centred on the assumption that older people are no longer productive members of society (Danaher, Cook, Danaher, Coombes, & Danaher, 2013). In contrast, this ethnographic inquiry of "walking with others—sharing their step, style and rhythm" (Pink, 2015, p. 111), encouraged the co-production of valuable research knowledge, giving voice to the marginalised identity of quiltmakers. Furthermore, the quilters, recognising the validity of their own voices and actions, took shared ownership of "their" research to view quiltmaking as a contemporary model of apprenticeship learning.

Contemporary Quiltmaking Communities

Active quilting guilds, groups, and associations exist in regions around the world, along with the development of an international multibillion-dollar industry of quilt-related supplies, and increasing trend of quilters utilising social media. With the continuing evolution of quilt styles and techniques, new traditions have been created. Quilt exhibitions, showcasing traditional and/or art quilts, draw record-breaking attendances (Bresenhan, 2010). According to the Quilting in America™ 2017 survey

(The Quilting Company and Quilts, Inc., 2017), the average North American quilter is female, 63 years old, well-educated, and has been quilting for 19 years. Furthermore, Roberts (2007) asserted "quilters need communities" (p. 120) which provide opportunities for fellowship and sharing ideas, in addition to being surrounded by people who appreciate their motivation for, and the value of, quiltmaking. In general, making crafts together has been seen as an important way to exchange mutual respect, nurture interaction and well-being, and build collaborative skills in the craft makers' community (Burt & Atkinson, 2012; Maidment & Macfarlane, 2009; Schofield-Tomschin & Littrell, 2001).

In Aotearoa New Zealand quiltmaking is practiced almost exclusively by women as a leisure activity. There are different types of quilting communities ranging from regional guilds, quilt groups, online collectives, Pasifika craft gatherings to philanthropic organisations. A biennial National Quilt Symposium (started in 1984), the formation of Aotearoa Quilters (National Association of New Zealand Quilters), the publication of *New Zealand Quilter* magazine, and access to a range of quilting products and services have raised the profile of quiltmaking. While New Zealand quiltmakers respect past traditions, Wanigasekera (2010) found they also embraced and drew on "many influences that surround them, transforming these influences in stitch and cloth, and imbue their work with new meanings" (p. 276). Collective quiltmaking is a creative process, yet most of quilt scholarship focuses on the quilt, not the quilters themselves (Stalp, 2007).

Informal Learning and Quiltmaking

Sociocultural perspectives view human activities as situated in a cultural context where learning is embedded in an ongoing process of participation or social practice. Much learning goes unnoticed or is considered second nature, since it is "simply an integral part of everyday activity" (Hodkinson & MacLeod, 2010, p. 175) creating an appearance of naturalness. Due to its "unstructured and organic quality" (Golding, Brown, & Foley, 2009, p. 53), the value and significance of informal learning are diminished in relation to the education sector. There is an absence of an

agreed definition of informal learning; however, the main tendency is to conceive it as *anything* that falls outside non-formal learning and formal education systems (Duguid, Mündel, & Schugurensky, 2013). For our purposes, this common conception of informal learning is positioned within the socially, culturally, and historically constituted world of the quilters' everyday social practice.

The situated nature of quilting knowledge draws attention to the social activity, context, and culture of communal craft making. An investigation of apprenticeship learning was a stimulus for Lave and Wenger (1991) to develop a theoretical perspective of situated learning as social practice. They facilitated a conceptual shift from the traditional view of apprenticeship training to a decentralised notion whereby mastery resides in the organisation of a community of practice, thus redirecting focus to the structure of the community's learning resources. A community of practice is a collaborative term, emphasising relationships among participants who "share a concern or a passion for something they do and learn to do it better as they interact regularly" (Wenger-Trayner & Wenger-Trayner, 2015, p. 1). Women who belong to quilting communities have a passion for quilts and quiltmaking. The practice of "doing" quilting involves members of the community working collaboratively in an attempt to understand better their world of quiltmaking. Furthermore, Lave's (2011) seminal study on Vai and Gola tailors provided an exemplar of craft apprenticeship as a form of informal learning whereby newcomers were able to engage in the tailoring process by watching, questioning, and emulating more skilled apprentices. But she contended that apprenticeship learning was more than just "everyday 'hanging out' in tailor shops" (p. 48) and absorbing technical skills. In a similar way, Rogoff (2014) examined how informal learning occurred through intent participation within Indigenous-heritage communities of the Americas. While metaphorically resembling master-apprentice relationships, she noticed that the integral part of the everyday activities, which took place in family and community, was learning by observing *and* pitching in. These reconceptualised sociocultural models of apprenticeship learning serve as useful theoretical resources in studying informal learning and teaching in communal quiltmaking settings.

Textile handcraft communities provide opportunities to participate in learning activities, both formal and informal. Formal approaches are associated with institutionalised instructional methods, such as workshops and seminars, while informal processes seem to be more casual arrangements through social interactions (Schofield-Tomschin & Littrell, 2001). There are challenges in mastering new techniques, maintaining skills, and seeking knowledge. In Aotearoa New Zealand quiltmaking organisations, guilds and groups have a common goal to share knowledge about patchwork and quilting. For instance, Aotearoa Quilters' mission is to provide opportunities "to expand horizons, to share work, and to learn" (Aotearoa Quilters, 2019, para. 1). Cheek and Piercy's (2004) North American study found that quilting activities assisted older women to create positive age identities, gain respect as skilled craft makers, teach and mentor others, and preserve family traditions. Meanwhile, Stalp's (2007) findings revealed that North American midlife women hid their identities as quilters, keeping "their quilting secret from others, as many misunderstand what quilting is, and have stereotypical thoughts about people who quilt" (p. 49). "Becoming" a quilter requires overcoming barriers which marginalise identities, in order to define quilting in the participants own terms, both personally and collectively.

An Ethnography of Lived Experience

Ethnographic methodology is central to documenting distinctive ways of life, values, and beliefs, providing a descriptive account of a culture or community. An ethnographic inquiry was undertaken within the situated context of communal quiltmaking, placing an emphasis on representing the beliefs and lived experience of the participants in order to build a comprehensive and cohesive picture of their quilting activities. Understanding *how* the participants made sense of their lived experience required inhabiting their social real-worlds to determine real world practices (Atkinson, 2017; Delamont, 2016). Conducting the research *in situ* drew attention to the significance of meanings the participants bestowed on material objects, relationships, and themselves during their everyday activities and practices (Hammersley, 2018). Nonetheless, Madison

(2020) cautioned the ethnographic researcher that marginalised identities, such as quilters, may perform the stereotypical caricatures they believe we hold of them. Consequently, the researcher-participant relationship became a key variable, not only in building trust and establishing rapport, but also in developing a collaborative focus on exploring the social and cultural phenomenon of their informal learning. This was a study of everyday learning and teaching; an investigation about the process of quilting in a community setting, which occupied a place of significance in women's lives.

In recognition of the everyday nature of fieldwork itself, it was decided to apply Wolcott's (2008) research strategies of *experiencing*, *enquiring*, and *examining*. Experiencing drew attention to what was accomplished through participant observation, whereby the researcher stitched along with the group as a participant, while at the same time the quilters knew of her researcher's role to observe their activities. Enquiring required taking an active role in asking about what was going on in quilting activities, most commonly during casual conversations but also through individual and oral history interviews. Finally, examining entailed "sifting through what had been produced, or left by others, in times past" (Wolcott, 2008, p. 62). The research design was logically structured but left open-ended for the potential inclusion of participatory creative methods.

The Research Participants

The selection process was determined by inviting quilting groups, located in the same provincial area and with open memberships, to participate in the research over an eight-month period. A user-friendly pamphlet, along with the official Information Sheet and Consent Form was produced, outlining the research study to ensure inclusive participation. Kōmako Quilters (KQ) and Manumea Quilters (MQ) were delighted at the prospect of being involved. Pseudonyms were used for quilting groups and participants. The sixty-six participants were aged from late 30 year olds to 80+ year olds, with the majority being older persons over 60 years. These two quilting communities were divisions of larger quilting organisations, and while they each met during the day, other divisions gathered either

in the evening or at the weekend, to cater for members' needs (such as employment or caregiving commitments). While KQ had a formal committee elected each year, MQ was led by group coordinators with the support of senior members.

The Research Reality

Unstitching the informal learning practices of the quilters was not straightforward. Stepping through the entranceway into the quiltmakers' communal spaces, the researcher was overwhelmed with a sense of creative chaos and multi-voicedness: constant movement, sewing machines whirred, the smell of a hot iron, and chatting interspersed with bursts of laughter. At the second and subsequent quilting sessions there were new faces, and several quilters who had attended the previous week(s) were absent. With the coming and going of quilters, how could research participants be distinguished from non-participants? A non-obtrusive token, in the form of a button, was selected from a basket of the researcher's button collection (Fig. 14.1a). This active enterprise provided an opportunity to meet and talk with each individual, establishing a rapport with group members who were keen to express their ideas, opinions, and concerns. While the researcher had anticipated the button would be placed in a visible position on the table each week, the participants had other ideas (Fig. 14.1b–d). Unwittingly, the material artefacts made with the token button elicited information about the quilters' personal backgrounds and their values, and raised an awareness about the range of craft skills and knowledge within the quilting community. This activity ignited the sharing of diverse narratives by research participants, such as retirement from a sheep farm and associated woolcraft activities, and a group workshop held to learn new appliqué techniques.

In the early stages of the study the researcher found it difficult to know where to look, evidenced by a comment in her reflective journal: "I missed how three quilters, sitting next to me, managed to create three different thread holders using the same pattern". Even though on the

Fig. 14.1   (a) Researcher's button basket containing identification tokens; (b) garment brooch; (c) felted wool ornament on sewing basket's handle; and (d) appliquéd sewing bag embellishment (photographs by Linda Claire Warner)

surface the quilters' practices appeared messy, their everyday lives had to be inherently organised. Wolcott (2008) advised that "ethnography as *mindwork*, is not merely a set of techniques for *looking*, but a particular *way of seeing*" (p. 46). Additionally, Atkinson (2017) advocated that we should be *thinking* analytically as fieldwork is conducted. Adapting Rogoff's (2003) three planes of analysis—personal, interpersonal, and community—provided a practical and manageable platform upon which to systematically observe the quilters' activities. For instance, Meg was

stitching her first sampler quilt—two quilters showed her how to knot threads—KQ instigated a beginners' class in which Meg was enrolled. Foregrounding an individual's activity, gaining information about her interactions with others, followed by a broad sweep of the communal landscape, led to making principled decisions about where (and when) to look during the research process.

A participation-based approach considers knowing is in the relations among people within culturally and historically organised activity systems, like quilting communities (Lave, 1993; Rogoff, 1997). The mapping of social relations, using sociograms over timed intervals, revealed (i) the interpersonal structure of the quilters' friendships, (ii) individual roles and responsibilities, and (iii) that physical spaces were cultural spaces, where people were "doing" things either individually or collectively. The significance of familial-like relationships was evident throughout this study, supported by participants' comments such as: "It's a lovely whānau [family] group here. I love them." Learning and development occurs in the medium of people's participation in ongoing social practice, "transforming their understanding, roles, and responsibilities" (Rogoff, Matusov, & White, 1996, p. 390). Therefore, it was important to recognise, examine, and document changes taking place. Observations indicated that everyone participated in the process of learning and shared responsibility for learning through guidance and collaboration. Findings were enriched through the contributions of the older participants, such as the discovery of KQ's scrapbook. This encouraged long-standing members to share personal narratives, with multiple meanings aired, while others listened, having no or little prior knowledge about the group's past experiences. Moreover, this activity stimulated the quilters to voluntarily bring along "treasures" to share (for example, a family quilt), recognising the potential for further educational research within their quilting community. The quilters' spaces were also socially re-constructed as they gathered around technological tools for learning purposes to access a quilt pattern, view photographs of a quilt workshop, or share an email of an upcoming quilting event. Computers, cameras, and mobile phones were part of many quilters' toolkits, further exemplified when a participant exclaimed to another, "You Google it [YouTube video] then you'd be able to see somebody else doing it!" Examining the seemingly ordinary and

everyday items provided material evidence of unique insights absent from written records, as well as highlighting the cultural significance of visual and material artefacts (Lemire, 2009).

The researcher had been so immersed in the dialectal relations and exchanges of the quiltmakers' world, she did not notice "an invisible thread"—the tacit nature of quilting knowledge. Tacit knowledge is the term used to describe the phenomenon that "we can know more than we can tell" (Polanyi, 1966/1983, p. 4). Unable to photograph or video participants (due to privacy issues), the researcher sketched illustrations of various interactive situations which, unexpectedly, exposed the tacit complexities of quiltmaking. Much of the quilters' knowledge was created and communicated without being verbalised. Rather, this knowledge was embodied in the participants' experiences. Embodied interactions, such as making physical gestures and using tools in craft activities, reflected the maker's thinking and communicated knowledge to others (Koskinen, Seitamaa-Hakkarainen, & Hakkarainen, 2015). Employing illustrations as a visual method of data production facilitated a way of interpreting and understanding the quilters' viewpoint that "You *see* what others *do*".

There was strong personal interest, motivation, and much time spent engaging in meaningful educational activities. Thirteen MQ participants autonomously undertook an innovative inquiry to advance their design knowledge. A "Block of the Month" activity was purposely planned and coordinated, originally to be sustained over a calendar year but, such was the enthusiasm, completed within six months. The collaborative inquiry process gave rise to new questions, requiring further elaborated conceptualisation, leading to another cycle of knowledge generation with the sequential activity of "Design a Block with a Twist".

Furthermore, there was increased involvement by other community members, made visible through their productive contributions. Together, they developed *new* knowledge, which was more complex than their existing knowledge and extended beyond knowledge that the quilting collective had previously encountered. During this knowledge creation, the primary focus was on interaction *through* specific objects (or artefacts) of activity being systematically developed, rather than only on interaction between people. The advancement of communal knowledge, through an inquiry process of collaborative designing, broadens participation-based

approaches of apprenticeship learning to consider the elements of trial-ogical learning (Paavola & Hakkarainen, 2009), that is, individual, community, *and* shared objects in the quiltmakers' setting.

To conclude, the development of a reflexive approach was essential, enabling the researcher to explore presuppositions, assumptions, and biases; question her own and others' interactions; and make informed decisions, in an effort to rigorously ensure the participants' meanings predominated. The researcher learned alongside the participants—no longer assuming that the familiar was quite so familiar, nor taking for granted what might count as strange (Atkinson, Coffey, & Delamont, 2003). The practical fieldwork meant modes and intensity of participation had to be versatile and contingent with the idiosyncratic nature of the quilters' practice. Ethical issues of privacy became complex because there was a fine distinction between what was public or private in community-based settings (Hammersley & Traianou, 2012). While zones of privacy may be similar, it was necessary to presume for each quilter it was different and changing. Deciding how to portray and frame the participants' transformative sociocultural practices has far-reaching consequences, particularly since descriptions, example and illustration selections, and re-construction of their interpretations all have ethical implications (Atkinson, 2017). Such reflexivity acknowledges that sub-jectivity and objectivity are complementary, rather than opposites, when used in tandem to produce credible results in educational research (Danaher et al., 2013).

Conclusion

Ethnography is both a process and a product. Understanding the ways in which quilt culture, including language, nuances, and quilting knowl-edge, were embedded in the quiltmakers' social organisation of learning, required immersion in their shared practice. However, this ethnographic inquiry was a collaborative process, whereby the participants became co-producers of research knowledge. This approach was about researching

with people, giving voice to the marginalised social category of older women who quilt. The multisensory ways in which the research participants experienced their patchwork world revealed the complexities of explicit and tacit meaning-making. Learning-and-teaching are considered to be inseparable, with practical knowledge exchanges occurring amidst other happenings.

Far from being fringe dwellers living in a "fuddy-duddy" world, the quilters were border crossers initiating creative research methods and developing innovative inquiry approaches to advance *our* knowledge about informal learning. The research participants' contributions challenge the idea that quilting communities are stable conservative entities. Instead, the quilters and the researcher were all apprentices engaged *as* learners, focused *on* learning, recognising that "apprenticeship was a process of *changing* practice" (Lave, 2011, p. 156). This study's collaborative research approach also extends the participatory view of apprenticeship learning (e.g., Lave, 2011; Lave & Wenger, 1991; Rogoff, 2014) to build on the research work of innovative knowledge communities (e.g., Paavola & Hakkarainen, 2009). Within the educational margins of collective quilting, there were reciprocal transformations of participation, practice, *and* material artefacts.

Nonetheless, towards the end of this study, Vicki shared the following sobering narrative with the researcher:

> I brought along a colleague from work, who's nearing retirement age, to the quilting group. The woman works part-time and older than me. At the end of the quilting session she decided not to return saying, "Members are too old".

As Vicki watched the quilters stitching and talking together, she quietly said, "I don't see that". "Neither do I", replied the researcher.

Situated, social learning is a meaningful educational activity for older women. Further research is required to create new and transformative understandings about the marginalised community of quiltmakers.

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15

Insider Research: Articulating the Voices of Women Schooling Their Children in Remote Queensland, Australia

Marlyn McInnerney

Abstract Families in remote Queensland, Australia, face a range of challenges, including the education of their children. The question of education strategies was included in the semi-structured interviews conducted with the women. The education of their children emerged as a major concern.

The researcher, who raised her own children on their family grain and cattle property in remote Queensland, faced these issues herself. This case study focused on ethical questions of insider research in such situations. Following Hewitt's (Ethical components of researcher researched relationships in qualitative interviewing, *Qualitative Health Research, 17*(8), 1149–1159. https://doi.org/10.1177/1049732307308305, 2007) taxonomy of the components of ethical research, such as bias transparency, reciprocity, respondent validation, research purpose and the ethics of

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care, insider research ethics are examined in relation to the dilemmas and strategies of remote families when planning for the education of their children.

Keywords Australia • Gender • Geographical isolation •
Insider research

Introduction

This chapter discusses why and how the children of women in remote Queensland are positioned as learning on the edge and the strategies the women employed to fiercely resist the educational marginalisation of their children. The term "marginalisation" in this situation is discussed. Chiefly, the development of effective and ethical approaches to researching with these respondents in remote Queensland is delineated. These considerations included the research paradigm chosen; the participant recruitment process; the style and depth of the interview conversations; research rigour; and the dissemination of the results.

The position of the insider/outsider researcher frames the discussion. This positioning included not only sensitivity, confidentiality, respect and reciprocity in the research methods and analysis but also the necessity to avoid producing or reinscribing disempowering marginalised subjectivities for the respondents.

The Project and Its Framework

Collecting and collating the experiences of women on the land with regard to their efforts around educating their children was part of my PhD project which investigated resilience strategies of rural women. In this project, 20 women on the land were interviewed, many of them two or three times, and their responses coded and thematically organised into discourses and discursive identities. Ethically, I sought to employ a feminist post-structural research perspective which underscored a

non-hierarchical, egalitarian, non-judgmental, collaborative approach (Bhopal, 2010; Campbell & Wasco, 2000; Pini, 2004).

Feminist epistemology foregrounds women's lived experiences as legitimate sources of knowledge (Bhopal, 2010) and attempts to redress the historical privileging of male research subjects and the androcentric bias of researchers (Campbell & Wasco, 2000). Feminist informed research reflects an "ethic of respect, collaboration and caring" (Campbell & Wasco, 2000, p. 775). These feminist research precepts reinforced and supported my intention to focus respectfully on women's experiences.

Post-structuralism was useful for meaning-making and comprehending a sense of the multiple realities my respondents inhabited. This paradigm posits that people are constituted, or shaped, by the constellation of the discourses, overlapping and competing, within which they exist (Jones, 2003). According to Foucault (1980), these discourses are formed and maintained by power interests. In the interviews, the women spoke of their disempowerment as daughters-in-law within what rural scholars refer to as "the gendered power relations in family farms" (Pini, 2007, p. 45).

Background

Women on the land in remote South West Queensland are geographically distant from educational facilities. The term "remote" is derived "from measures of road distance between populated localities and service centres" with amenities that include schools. Many of the respondents lived on properties hours away from the nearest towns. Women described the challenges they faced accessing schooling for their children when there were no accessible educational institutions, or if available, were substantially under-resourced. In a geographical and resource sense, the women and their children lived on the margins of educational provision. Children in the margins "typically demonstrate lower levels of educational attainment" (Messiou, 2012, p.10). The women were determined to prevent the possibility of educational disadvantage of their children.

Gender-based disempowerment impacted upon the efficacy of the women as advocates for their children's education. Although living in a

wealthy country and married to landowners who often owned substantial assets, women on the land in Australia have historically been denied voice, influence and the same rights as urban women (Alston, 2003; Grace & Lennie, 1998; Voyce, 2007). Historically, during settlement in the 1800s, two broad discursive identities for women were established. One was as the wife of a member of the squattocracy, with attendant large holdings and large homesteads. The more gentrified the landowners became the more constrained the lives of women and children. The squatter's "grand house was the symbol of his style, and its prisoners were women" (Dutton, 1985, p. 94). An alternate identity for settler women was the hard worker who toiled on the land as long and as diligently as the men. The latter existence of such women was erased statistically by a colonial government in the late 1890s that attempted to project an image of gentility in Australia (Alston, 2003; Voyce, 2007). Either way, women on properties were rendered invisible and silenced.

Vestiges of these discourses emerged in this research project, as women grappled with competing discursive expectations. Respondents spoke of maintaining appearances, dress codes, family privacy and proper behaviour while simultaneously labouring both outdoors and in the homestead office.

The masculine hegemony that characterises the culture of families on the land (Alston, 2012) produced another discourse for women, that of the outsider within the family of their in-laws. Most women, especially if they were not from the country, remained unaware before they married of the "web of feudal-like arrangements of which they [would] soon be a part" (Voyce, 1993, p. 122). Properties were owned within a range of farm financial structures and men were the owners of the capital resources (Hay & Pearce, 2014). Voyce (2007), a legal academic, noted the enduring privileging of male rights in family settlement cases, with the presumption that the farm viability under male ownership is a higher value than the contributions or rights of wives or daughters. He attributed this to legal and institutional support for the special status of farms, and their specific masculinist dominion (2007).

Thus, unsuspecting young women often moved away from their own families and locales to marry into a patrilineal, patrilocal masculinist culture, where they found themselves isolated and positioned in a tangled

web of men who were all related. As such, they often unexpectedly experienced a "sense of marginalization relative to their husband's family of origin" (Trussel & Shaw, 2009, p. 434). Not only were they outsiders, they were often treated with suspicion, in terms of their potential impact on farm assets. A common saying, still current, was: "The most feared beast on the farm is the daughter-in-law". This precarious situation contributed to their geographical and emotional marginalisation.

Women have attempted to form alliances and to find ways to advocate for themselves and for their children. Women's representation in traditional agri-political organisations has been minimal (Alston, 2003). Participation and leadership by women in these organisations have been constrained by the "central and seemingly unmoveable place men and dominant masculinities play" (Pini, 2005, p. 86). In the 1990s, a range of rural women's organisations, such as Women in Agriculture (WiA) and Queensland Rural, Regional and Remote Women's Network (QRRRWN), were founded and achieved some success. However, such organisations have struggled to build a consensus among members when developing strategies, which has contributed to muted advocacy (Alston, 2009; Pini, Brown, & Simpson, 2003; Grace & Lennie, 1998).

Marginalisation

Ethical research which focuses on marginalisation includes the imperative to avoid defining a group as marginalised, especially if this notion is not part of their identity. Introducing the concept of marginalisation or otherness may negatively label a cohort and feelings of inferiority may become internalised (Mowat, 2015). This is part of a broader axiom which exhorts the researcher to be mindful of the personal and political situations of respondents and "take extra care not to increase their vulnerabilities, otherwise the damage could be more severe" (Danaher, Cook, Danaher, Coombes, & Danaher, 2013, p. 145). Specifically, I did not want to reinscribe women as victims as has been done is some feminist constructions of rural women (Grace & Lennie, 1996). However, marginalisation as a concept was useful as a framework to discuss a number

of aspects in the discursive realities of women who live and work on the land.

Marginalisation manifests in many ways, can be formal or informal, and includes the labelling of the group or individual, as well as the acceptance or resistance to the label by those affected (Mowat, 2015). Although these women inhabited a world where the pervasive masculinist hegemony contributed to their gendered invisibility and concomitant outsider status, they did not self-identify as fully marginalised. Mowat (2015) contended that in order to be considered marginalised, a person or group would need to feel that they were excluded from an ideal. The most salient area of exclusion my respondents identified was their difficulties in accessing educational opportunities for their children. Hence, their gendered invisibility combined with their geographical isolation did create a sense of marginalisation in educating their children, specifically their inability to "access the range of services and/or opportunities open to others" (Mowat, 2015, p. 457).

Thus, I concluded that women on the land experienced partial marginalisation through their gendered outsider status, but most acutely through the tyranny of distance which impacted on the education of their children.

Insider/Outsider Researcher

I consider myself to be an insider researcher, having lived with my husband and our children on our family grazing and broadacre properties for thirteen years in South West Queensland. The advantages of being an insider researcher include the ability to easily recruit participants. The first four of the 20 respondents were friends, and referrals flowed on to me through the snowball technique. Friendships allowed me to develop rapport more quickly. Common experiences and interests added a more comprehensive understanding of the context and the complexities of the situation being researched, and an intense, often personal and motivating interest in the inquiry (Dwyer & Buckle, 2009).

My outsider status came originally from being a Canadian urban immigrant with a different cultural perspective, and latterly, from the

outside perspective afforded by my researcher lens. Another area in which I was an outsider was that I married into an agricultural family, and as the outsider daughter-in-law, had to learn to adjust to this unfamiliar and all-pervasive farm family culture. This was a commonality I shared with all of my respondents.

Thus, the duality of the insider/outsider researcher space afforded a number of advantages. My outsider perspective inspired my curiosity about Australian women on the land, their resilience and strategies in the face of rural challenges and lack of resources, such as education facilities. My insider status facilitated the open and fulsome responses of the participants. In a sense, as qualitative researchers, we are all both insider and outsider researchers: insiders because we come to know our participants very well, and outsiders because of our researcher lens (Dwyer & Buckle, 2009).

Ethics

As with all research projects, the proposal was submitted to the ethics department at the university. The ethics application included provisions for ensuring confidentiality, in the information and consent forms, secure data storage and respondent validation. In an effort to ensure the ease of my participants, I decided that the interviews with the women would be conducted at a venue of their choice, which might be their homes. The ethics department, in conjunction with the risk assessment department, questioned the safety of driving to remote homesteads on my own. They suggested that phone or video interviews would be more appropriate, or that meetings be held in the nearest towns.

However, the internet is unreliable in many remote locations. In the spirit of situated ethics in understanding that the construction of complex groups is "tied to questions of power and (dis)empowerment" (Danaher et al., 2013, p. 144), I felt that I should demonstrate understanding that distance is a factor of disempowerment for these women. For instance, many of the respondents routinely drove long distances daily for their children's schooling. Further, proximity ethics, that is, "respect, caring, humanity and obligation to the other" (Hinze,

Romann-Aas, & Aas, 2015, p. 9) contributed to my argument that it was important to show willingness to travel to the respondents, rather than expecting them to do the travelling. My ability to drive a utility vehicle with a two-way radio, and my familiarity with country road conditions supported my case.

Some of the respondents met with me in cafes in the nearest towns but most women invited me to their homes. This necessitated a driving time for myself ranging from one hour to eight hours away from my home. The participants appreciated this gesture, particularly considering the hours of driving they did to educate their children. Additionally, my willingness to drive to their venue of choice indicated respect and acknowledgement of their lived experiences.

My impression was that because I was empathetic and understood from my own lived experience this and other situations they faced, they felt comfortable disclosing their frustrations about a range of issues. Sometimes, like Bhopal (2010), I found that "the more I revealed about my own personal experiences, the more I felt the women began to trust and open up to me" (p. 192).

On the other hand, sometimes the assumptions the respondents made about the similarity of my lived experience to theirs were enough to engender trust and openness. Like Pini et al. (2003) in their research with cane-grower women, I didn't mention my feminist perspective. Pini, who was also an insider researcher, suggested that the identity of feminist had "significant negative connotations" in the rural context (Pini et al., 2003, p. 174). Upon reflection, and ongoing observation, I decided that while a certain level of self-revelation and similar life experiences were important to establish rapport, the women did not seem too concerned or curious about deeper aspects of my life; they were, for the most part, quite gratified to be taken seriously and, as several of them said, to have the opportunity to talk about serious things. Like Pini, I pondered the ethics of lack of full disclosure, but, in the end, decided that my intentions were "motivated by a sympathetic engagement with the context and culture" (Pini et al., 2003, p. 174).

I sought to understand and to give voice to the complexity of their situations, the factors affecting their decisions, and their strategies for navigating the difficult terrain of educating children in remote

Queensland. When appropriate, I shared my own challenges educating my children, and my experience of relocation for their education. This encouraged the women to respond with their experiences. The informal semi-structured interview format gave space for in-depth and detailed conversations (Danaher et al., 2013), which contributed to rich data.

The Data

Lena (a pseudonym), at the time of the interview, had been living in a major regional town for two and a half years with her primary aged children until they were ready for boarding school in Year Six, at age eleven. Prior to this situation, she had attempted a range of education strategies:

> So we are 80 kilometres from town, so the first year or two, we did distance education. The problems having a govvy [governess- a live-in school-teacher] and the standard of Queensland Education at the time, we changed the curriculum to C2C [Curriculum into the Classroom]. It's very internet based and we were really struggling with the internet. So we decided we would drive to a little school that had about 20 kids. A one teacher school and it was 60 kilometres away. So we were doing about 1800 ks [kilometres] a fortnight. We petitioned the government to get this nine-day fortnight, which was fantastic, because every second Friday you had [a] long weekend. So we did that for four or five years.

Lena realised, as her children grew older, that they were falling behind in learning and that there was "no one that could give them that bit of extra help that they needed". At that point, she and her husband made the decision that she and the children would relocate to the closest regional city so the children could attend a few years of formal primary school education living with her before boarding.

Some of the mothers who moved to a regional city with their children enrolled them in schools that offered boarding. Thus, it was easier for the children to transition into boarding when the mother returned to the property. Most families in the research accepted that it was standard

practice in the country to send their children away at age 12 to secondary schools with boarding facilities.

The lower level of educational attainment for children as a possible consequence of education marginalisation (Messiou, 2012) was a common fear amongst the mothers. Their anxieties intensified when their children experienced learning disabilities. Several issues overlapped: distance from schools, inexperienced and under-resourced staff, lengthy driving hours and the disquiet of the untrained mothers when required to teach their own children.

Several of the women taught their children at home through Distance Education, which is provided by the Department of Education, Queensland, Australia. Families register their children in Distance Education, which provides online learning modules and assessments, following the Queensland Education curriculum. Some mothers were more suited to the role than others. Grace (a pseudonym) was comfortable enough in the interview to share her insecurities with me, with an overlay of humour:

> I thought I could teach correspondence. However, it was quickly realised that I didn't have the self-discipline nor creativity for Preschool. All that cutting, colouring and pasting. My kids also didn't have access to TV, so they missed the fundamentals from Play School and Sesame Street. We were all paddock and cattle orientated. [In the] morning—we would traipse into the "school area", open the resources box, and all hell would break loose. Tears from all sides by the end of the session.

Grace conceded defeat and drove her children to the closest local school for many years. However, when the children were about 10 years old, "Learning difficulties and under experienced young state teachers combined", and Grace and her husband enrolled both children into boarding at a convent school in the nearest regional town.

Penny (a pseudonym) lived four hours away from a major town. When her three children were younger, she would drive to town, place the children in a childcare facility and do her shopping. She felt that spending time in childcare helped her children learn to socialise with other children. When they were ready to go to school, they were able to attend a

local one-teacher school. However, one of Penny's children was diagnosed with autism and, as a result, was home schooled for primary and secondary school. On their property was a cottage with a small demountable building (donga) attached. The donga was renovated into a school room and the cottage to a residence for the governess:

> The first two years, Prep and Year One, I taught Callum. … Then it was just getting too much for me because I had … three kids in three different teaching environments. That's when we decided to get a governess. So we've had a governess more or less off and on for … all of those years.

Penny was fortunate that they were able to both find and afford a governess. Other mothers expressed their frustration regarding the difficulties of engaging suitable people willing to relocate to remote properties to teach children. If such a person was found, the next issue was affordability. Isolated Children and Parents Association (ICPA) research found that in 80 per cent of farm families who used distance education, the mothers performed the role of unpaid governess. Such a position could fully occupy 35–40 hours a week, and continue for 8–10 years, depending upon the number of children (QCL August 08, 2019, p. 25).

Alternatively, families could separate. This could mean that the mothers moved to a local or regional town to educate their children. Another option was to send their children to a boarding school.

Many of the options women faced were not ideal. Respondents revealed their heartbreak when sending their children away to boarding school, and conversely, the pressure on their marriages for those who moved to town to educate their children. It would be difficult for women to discuss these decisions with a researcher who might judge their choices unfavourably. As an insider researcher, I was able to confirm that I had been faced with similar decisions in my life in remote Queensland, and I had lived experience of the difficulties these mothers faced. In this way, I could tacitly reassure respondents that I would not "harm or place at risk [their] well-being [through] shaming, ridicule … and misrepresentation" (Danaher et al., 2013, p. 144).

There were several challenges associated with insider research. Firstly, the respondent could feel that detailed explanations of their experiences

may not be necessary due to the fact that I might already possess a certain amount of knowledge (Dwyer & Buckle, 2009). To mitigate this situation, I prefaced many questions with phrases such as: "Although I know a little bit about this, I would like to know how that experience was for you, in your own words". Secondly, even allowing for the idea of co-construction of knowledge where the researcher's experience is part of the data (Hewitt, 2007), there may be the risk of "knowledge distortion" (Taylor, 2011, p. 6). Taylor suggested that time away from the milieu to gain some distance, critical reflexivity and ensuring that a proportion of the respondents were unknown to the researcher were useful distancing tactics. To ensure authenticity, five of my respondents were completely unknown to me before the project. The outsider perspective from living in a different locale recently, and approaching the conversations through a researcher lens, was beneficial. Also, I regularly reflected upon my processes in my research journals as well as through frequent discussions with supervisors and colleagues.

Further, in order to ensure that my participants felt comfortable with their contribution to this co-created research I utilised a form of respondent validation. This also provided participants with the recognition that they were "the experts in the field of their own experience and views" (Hewitt, 2007, p. 1157). I also used it to seek final permission to use their interviews in my study. This required that I sent them the de-identified transcripts. Individuals' names and locations were altered for the protection of anonymity and confidentiality. I re-assured them of their right to withdraw all or part of the interview data or, in fact, to add material. This was explained before the interviews occurred, and again, when the transcripts were sent to them.

Conclusion

The women sought the best possible education for their children, and they were prepared to go to great lengths to provide their children the opportunity to participate in effective schooling. Most often, they used a combination of strategies. These included the provision of distance education; significant hours of driving to attend local schools; relocation to

regional towns with their children at the risk of putting pressure on the family unit; and sending their children away from the family to reside in boarding schools.

I sought to recognise and respect the "multiple, contradictory, and complex subject positions people occupy within different social, cultural, and economic locations" (Giroux, 2005, p. 13). As such I ensured that this research avoided reinscribing a silenced, outsider discourse. The research respondents described, through their dialogues, the multiple and contradictory discourses they inhabited, and how schooling their children represented a space which is particularly precarious. Their geographical isolation, combined with their gendered historical invisibility and ongoing lack of access to the centres of power and policy, contributed to their relatively powerless position. This also rendered their children vulnerable educationally.

Nonetheless, women drew on their other, more empowering, discursive identities to deploy strategies, tactics and compromises to manage the challenges of the educational marginalisation of their children in order to give them the best academic opportunities possible. In many ways, the mothers compensated for the gaps in education services and resources with their own time, energy and hard work.

When asked about governmental policy recommendations many women suggested more resources for education for their children, including subsidies for governesses, better training and resourcing of staff in small rural schools and assistance with the costs of boarding. They also desired their expertise and lived experience to be acknowledged and heard by policymakers, education administrations and politicians. For example, they were very appreciative when their requests were granted for the nine-day schooling fortnight.

The women themselves, armed with research work such as this project, and their own lived experience, can be effective advocates. Although rural women have been denied a voice historically, contemporary circumstances are changing. Women in remote Australia, individually and collectively are developing visibility and a voice, through social media, agri-politics and women's organisations. Insider research such as undertaken in this project can act as support material to effectively articulate and communicate their voices in rural education advocacy.

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16

Learning in Later Life: Issues Affecting the Efficacy of Research

Brian Findsen

Abstract Greater numbers of researchers are investigating the character of later life learning, especially as governments and civil society members globally become aware of the extent of population ageing and of the need to understand better what and how older adults are learning. While the field of gerontology is dominated by positivist (medical) approaches to research, the sub-field of educational gerontology has tended to favour interpretivist and more humanistic strategies.

This chapter examines the dynamics of later life research into learning/education, and it discusses the philosophical, pragmatic and ethical issues facing researchers in this fledgling domain. The argument is directed towards promoting a more participatory research approach that honours the integrity of older adult learners.

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Introduction

Greater numbers of researchers are engaging in investigating the character of later life learning, especially as governments and civil society members globally become aware of the extent of population ageing and the need to understand better what and how older adults are learning. Diverse approaches to research favouring interpretivist, critical theoretical and more humanistic strategies have gained popularity because of their strong connectedness with how older people conduct their lives, and emphasise holistic understandings of seniors' life complexities.

This chapter is constructed to understand better the dynamics of later life research into learning/education, especially as older people have been treated as a marginalised entity and largely rendered invisible in contemporary society (Phillipson, 2013). The chapter also discusses the issues (philosophical, ethical, pragmatic) facing researchers in this emergent domain. These issues are multi-dimensional—*philosophical* because strong argumentation is needed to justify educational resources for adults in their later lives; *ethical* because human values and interests can influence whose needs are given primacy; and *pragmatic* because eventually resources need to be allocated by those individuals/agencies in the best position to meet diverse later life demands. The central argument of the chapter is that a more participatory research approach (see Park, Brydon-Miller, Hall, & Jackson, 1993, for analyses of this type of research) best honours the integrity of older learners and is likely to engender more commitment from participants and positive ageing outcomes. The chapter draws on empirical studies undertaken by the author in an earlier career to illustrate issues of a varying nature related to later life learning.

The nature of research into older adulthood is as complex as any other kinds of investigation—it ranges from quantitative, survey type analyses of patterns of learning/education to ascertain the effects of national policies, including participation patterns, to qualitative, in-depth, more subjective exploration of older people's motives, their identities as learners (*identity capital*) and personal outcomes. In this chapter I emphasise more holistic approaches to studying the learning of older people as a marginalised group, and many of my observations are based on two qualitative

studies (one in Auckland, New Zealand; the other in Greater Glasgow, Scotland) in which I was the primary investigator as part of participatory teams of co-researchers (including older adults themselves).

Before looking into specific research issues involving older people's learning/education, it is necessary to ask the question "Who are older adults?"

Who Are Older Adults?

There are few generalisations about older people's lives that can stand close scrutiny and are entirely valid. Elsewhere (Findsen, 2005), I have discussed myths concerning older adults that are difficult to dispel. Unfortunately, some of these ageist attitudes are held by seniors themselves (Biggs, 1993; Phillipson, 2013). Firstly, the phrase *older adults* hides the reality that there is no uniform group; this is the myth of *homogeneity*. Heterogeneity more accurately summarises the reality. Clumsy attempts to define older adulthood abound. The age of 65 is an often-cited statistic for *older adult*, but the term has many contextual and cultural variations. Older people described, for instance, as *the elderly* are often patronised and subject to increased marginalisation, particularly in educational encounters and health care. There are marked differences between the lives of a middle-class European 55-year-old male living in an urban area and of an 80-year-old Māori woman living in a rural setting. An obvious implication for researchers is to define carefully who is included/excluded in studies of later life learning.

Another myth is that of *decrepitude*. A pervasive image, especially gleaned from a medical/health paradigm, is that older adults are in a constant path of physiological and cognitive decline where they are portrayed in a deficit discourse and paternalism pervades action (Phillipson, 1998). While there is limited truth in this medical depiction, it is tied to an outdated version of later life where a passive existence and withdrawal from society hold sway (Phillipson, 2013). The truth is that the vast majority of older people enjoy an active lifestyle.

A third and important myth is that older people are perceived as takers or *consumers* in society. Of course, many middle-class seniors may be

major participants in the silver economy, but often the positive contributions made by older people, especially in volunteering (Davey & Cornwall, 2003), are overlooked. Indeed, in the world of work, sizeable numbers of adults beyond 65 continue to engage in paid work, perhaps in less orthodox patterns (encore careers; seasonal work; part-time work).

The essential point concerning these myths is that they portray older people as *other* and often on the margins of societies. As researchers and educators, it can be argued there is an ethical responsibility in our research to render seniors in a more positive light, and to minimise ageism and discriminatory practices.

The Nature of Learning in Later Life

Much of my work has been focused on what constitutes learning for older adults, and usually in a more theoretical, analytical framework. However, in this chapter, I offer two contexts of empirical research to illustrate the problematics of identifying learning or education. While definitions will differ, I have differentiated learning modes/contexts on a spectrum from informal to formal. I define *informal learning* to occur where individuals learn in minimally structured environments, often vicariously; *non-formal education* to occur in structured environments that shape the direction of learning and where older adults still exercise considerable choice; and *formal education* to involve learning as hierarchically-structured, often expert-driven with a formal curriculum and sometimes being credentialed. In both studies below, I take a holistic approach to encompass all forms of learning because most seniors can be associated with two or three forms on a daily basis. For a variety of reasons, seniors tend not to engage much in formal education, but are more attuned to non-formal education opportunities (for instance, being trained in a social agency as a volunteer), and continue to learn in incidental ways as long as they live (Findsen & Formosa, 2011; Jarvis, 2001).

Paradigms and Conceptual Frameworks

In any research, it is important to identify the overall *paradigm* (major theoretical orientation to a phenomenon), and to acknowledge that many different paradigms have emerged in recent times (e.g., postmodern; critical feminist; cultural studies), but many social science texts have emphasised the positivist, the constructivist and the critical as prevalent ways of conceiving the overarching philosophical base for research (e.g., Cohen, Manion, & Morrison, 2000). In my own work, I have tended to emphasise a political economy approach for more macro-level investigations (where I focus on the role of the state in the lives of older adulthood plus the interaction of gender, race-ethnicity, social class, religion, age and other areas of social stratification in influencing the learning opportunities/constraints for/on seniors) and constructivist-critical paradigms for empirical research.

Applying a paradigm to each of the empirical studies, in the earlier New Zealand Auckland-based study (2002–2004), a constructivist-interpretive paradigm was chosen in which the research team sought to understand the broad patterns of learning for two differently-located groups of older adults (the North Shore, an urban context; Pukekohe, a satellite town on the Southern periphery). In the Scottish study (2005–2008), a more overtly critical educational gerontology (CEG) approach was taken. CEG emphasises that assumptions need to be continually tested, and that as researchers we need to unpack superficial appearances and to posit a more social justice ethic into our work (Battersby & Glendenning, 1992). In this West of Scotland study, there was a deliberate concentration upon how gender, social class and age affected the levels of engagements of working-class people in Greater Glasgow in three universities and four further education colleges (Findsen & McCullough, 2008). Hence, an overtly political economy approach, consistent with CEG, was used.

Conceptual frameworks vary in accord with the purpose of the enquiry, the chosen paradigm and the context of a study. I have frequently used a lifelong learning concept consisting of sub-themes as a baseline for understanding how learning in later life links with all learning in individuals'

lives. Older people were once younger, so they naturally share many attributes of what it means to be human with younger members of society; their personal identity may have changed, but the central core of their being is reflective of earlier life experiences (Phillipson, 2013). Hence, it is no surprise that the patterns of engagement of older people in learning/education are heavily influenced by earlier engagement or its lack (Findsen, 2005). The dictum "those who already have, get more" contains much truth.

Elsewhere (Findsen & Carvalho, 2007; Findsen & Formosa, 2011), I have discussed at length the main components of lifelong learning, reflective in many international governmental policies. In a nutshell, the strongest theme of lifelong learning, usually pushed by nation states, is that of an *economic imperative* so that older adults are judged to the extent that they are contributors to the economy (and, hence, studies concerning work-life patterns are increasingly useful, in part to help to dispel the myth of seniors' invisibility in the economy). Secondly, the liberal education imperative of *personal development* throughout life points to the rights of older individuals to continue their learning/education beyond the third age into the fourth (Laslett, 1991). Thirdly, the notion of the *active citizen* is important wherein older people are seen to be active contributors to democratic processes, exemplified in extensive volunteering. Finally, the theme of *social inclusion* (or avoidance of exclusion) holds sway where sub-populations in a society (e.g., Māori in Aotearoa New Zealand; low wage earners in Glasgow) are allocated additional resources to help to overcome historical marginalisation. None of these themes of lifelong learning is mutually exclusive; indeed, the very existence of a social inclusion policy is largely related to identifying who benefits most/least in the dynamics of a national economy.

Another conceptual framework that I have used in my investigations of lifelong learning emanates from the work of the pioneering educational gerontologist, David Peterson (1976, 1980). His definition of educational gerontology as "a field of study and practice that has recently developed at the interface of adult education and social gerontology" (1980, p. 62) encapsulates the spirit of understanding older adult learning from the perspective of how seniors deal with social issues. Further,

Peterson identified three foci for the future development of the field as follows:

1. Education for older adults;
2. Public education about ageing;
3. The education of professionals and paraprofessionals in the field of ageing.

I have found this relatively straightforward distinction to be a solid base for investigating where societies/cultures have placed emphasis and resources with the associated outcomes. However, I usually modify the first statement to be "Education for *and with* older adults". In the case of universities' engagement with older adult education (e.g., Findsen, 2017), the above conceptual framework is a very useful starting point for critiquing the marginalisation and relative invisibility of older people in these higher education institutions.

Research with Older Adults: Two Cases

The range of issues in undertaking research about older adult education is as plentiful (philosophical, ethical, pragmatic) as studies of schooling or adult education more generally. Clearly, these kinds of issues overlap and are not readily disentangled. In what follows, I provide some information about two empirical studies in which I was the primary investigator, and I identify relevant emergent research issues.

Case 1: Older Adults' Learning Patterns—Non-formal and Informal Activities in the Third Age   A fuller account of this study is provided in Findsen and Carvalho (2004, 2005, 2007). Funded by the Faculty of Arts at the Auckland University of Technology (AUT) to a modest level, this research sought to understand the kind of learning in which older adults engage, for what purposes, under which conditions and with what kind of outcomes (for individuals, group membership, the wider community). The research team consisted of members of the Older Persons

and Adult Learning (OPAL) Auckland network, fundamentally a group of enthusiasts interested in finding out more about third age learning (Laslett, 1991). Older adults were defined as people 55 years old or older (intentionally from a younger age to gather the views of those confronting a life transition from full-time worker to retiree). The key research questions were:

- What is the character of older adults' learning (informal, non-formal, formal)?
- What consciousness do older adults have of themselves as lifelong learners?

The study was undertaken in accord with an interpretive/constructivist approach (Merriam & Tisdell, 2016) and, was qualitatively based on in-depth, face to face interviews. The research was always constructed in the belief that this was research *with* older adults rather than *on* older adults. The focus of the study was on older adults' learning in the context of the social issues that they faced in daily life—economic sufficiency, securing adequate housing, keeping in good health, establishing effective social networks. The primary instrument of a co-constructed questionnaire was piloted and adjustments were made.

The findings are necessarily brief here. Most of the interviewees were keen enthusiasts for lifelong learning, some perceiving themselves as inveterate learners, mainly in non-formal and informal sites. Volunteering was identified as a significant mode of learning, and helped to sustain self-esteem in later life. The overall message from the study was to reinforce how older adult learning is inextricably linked with daily life and issues faced by individuals.

Emergent Issues

The study was always conceptualised as *participatory*—that is, one in which the older people themselves were involved in the research design, implementation and synthesis of the data. The primary researchers (myself and Lucila Carvalho, research assistant) met members of diverse

groups in both locations (the North Shore; Pukekohe) and, members of the OPAL research group were also present. Hence, recruitment of interviewees using a purposive sample was deemed successful (*n* = 75) built upon our collective knowledge of existing social networks of older adults (e.g., Probus).

The training of co-researchers was challenging, given the vast differences in capability of the interviewers (primary researchers and members of OPAL). One member of the training team, Helen Heppner, was a recently completed MEd student in adult education from the University of Auckland who provided leadership and support to volunteer interviewers. Yet the quality of transcripts was variable linked with interviewing dynamics and communicability (both interviewer and interviewee). An unexpected point of resistance was based on the reality that significant numbers of interviewees preferred not to be interviewed by a friend or a buddy. Proficiency in transcription (computer expertise) was also sometimes problematic. As the study moved from conceptualisation to implementation and to synthesis (analysis of the findings), the study became less participatory. Yet, at all stages, it was always productive to reinforce positively the value of the work of the volunteer co-researchers.

Aspects of continuity and discontinuity were salient. Changes in personnel occurred, especially for myself as the primary researcher, when I moved to the University of Glasgow in 2008. Another aspect of discontinuity was the unpredictable health of the co-researchers. While this phenomenon can occur in any research, it is more strongly connected to the reality of declining health in later life (Powell & Biggs, 2000), particularly those volunteers in their 70s and 80s. In addition, the sustaining of ownership of the research—it is not just to be another university project—was a priority.

The intent of this study was to elicit the perspectives of a diverse range of older people in two different milieux. The reality is that the interviewed older adults were primarily middle-class (with a majority of women) and, so their learning pre-occupations, principally of an expressive nature, reflected this bias. Only a paucity of data emerged from Māori and Pasifika, despite their proportions in the New Zealand population being around 15% and 8% respectively (QuickStats, 2013). The

lack of minority representation is acknowledged, and the research operations were not conducive to a Māori k*aupapa* (philosophy) perspective. Subsequent research in Aotearoa New Zealand on a national scale has been focused on Māori social issues, as in the current National Science Challenge—Ageing Well (2018).

Case 2: Older Adults' Engagement with Further and Higher Education in the West of Scotland—Tracking Educational Journeys A more extensive rendition of this study is available via Findsen and McCullough (2008)—the report of the University of Glasgow and the West of Scotland Wider Access Forum—and via Findsen, McCullough and McEwen (2011), and Findsen and McEwen (2012).

This study investigating the more formal end of the spectrum of modes of learning for older adults drew upon a political economy perspective, and biographical/narrative traditions within a critical educational gerontology (CEG) approach (Battersby & Glendenning, 1992)

As the title suggests, its focus was on why and how working-class older adults in the West of Scotland engaged with further and higher education, given the fact of historical under-representation. This marginalisation has been more typically experienced in the ancient universities (Tett, 2004). The study, funded by the West of Scotland Wider Access Forum, used a longitudinal design over a two-year period wherein 85 seniors over the age of 50 were interviewed four times. Older students from three universities (classified as *ancient*, *post-1992* and the Open University) and four colleges (with sites in community, urban/suburban and semi-rural settings) were recruited for the study.

At the time of the first interview, 53% of students were enrolled at a college, and the remaining 47% at a university. Using a qualitative approach, students who met age and deprivation criteria were invited to participate in the study via each institution's randomised selection. In both types of provider (college, university), the vast majority, but not all, were studying for a qualification. A small team of interviewers (principally advanced students in adult education from the University of Glasgow) engaged in the project on a paid basis, given that the funding from West of Scotland Wider Access Forum was sufficient and ongoing. Questionnaires were trialled, implemented and modified (especially for

later interviews where a more focused thematic approach was applied). Overall, of the 85 participants interviewed in the first round, a minimum of 50 were interviewed at all stages. The majority of students identified as "White-British", with 41% in employment (two-thirds full-time), retired were at 33% and the remainder (26%) not in paid employment. Importantly for this project (with its focus on working-class students), 39% were in receipt of at least one form of Social Services financial benefit (e.g., Pension Credit at 12%). Of the total sample, 21% were self-funded, the rest being on some form of Scottish Government provision, including the Fee Waiver Award (34%) and the Individual Learning Account (10%).

Findings in this study were reported under headings of early schooling experiences, motivation for study (personal, human and social capital relationships), funding (including student finances) and the impact on learning for personal life, and wider-life benefits (Findsen & McCullough, 2008). Social structural factors of gender and social class affected many students' engagement, especially that of women, where domesticity at an early age meant deferment of aspirations. For men (see Findsen & McEwen, 2012), young age entry into the workforce with minimal skills also had a lifetime impact on subsequent engagement in education.

Emergent Issues

A number of students experienced significant life-changing incidents requiring them to re-evaluate the nature and structure of their daily lives. These events included physical and mental health issues, long-term unemployment, redundancy, relationship break-up, social isolation and bereavement. Hence, older life formal education was frequently in response to a life transition or in anticipation of one (Jarvis, 2001). The problematics of retirement in terms of financial capability, ongoing social relationships and "good" health were motivators for involvement with formal study, alongside traditional liberal education motives of personal fulfilment (though at a lesser level for students in the further education colleges).

Conclusion

Drawing upon the two studies in a wider context of understanding the dynamics of later life learning, there are several aspects worthy of comment. No research is undertaken in a social-cultural context vacuum. The positionality of the research developers (in my case, as primary investigator in two universities of very different characters in primarily Western environments) is part of the matrix of the overall project. My primary motivation for both studies was to understand better the learning aspirations of older adults connected with the real life issues that they face, and to translate "desk" research into action. I have also always held a philosophy that marginalised older people (e.g., new immigrant elders) have been neglected in educational gerontology research. Upon reflection, the methodological issue of appropriate recruitment strategies is significant. More active recruitment of a broader range of senior co-researchers, given their more extensive networks, is likely to have resulted in a greater diversity of outcomes.

The funding base of the two projects made a substantial difference. In the case of the AUT-based project, the finances were very tight and volunteer assistance was crucial for its implementation. This necessitated a training programme for co-researchers that also helped to alleviate potential inconsistencies in data collection. Stated differently, the relative absence of significant funds was a trigger for a participatory approach in which older co-researchers had a constant voice in the operationalisation. In truth, this participatory approach was hard to sustain and, on reflection, greater attempts at dissemination were desirable back to the community groups that provided the participants (Merriam & Tisdell, 2016). This is an ethical issue for all researchers to negotiate more fully with co-researchers and participants.

In both studies, the health of co-researchers and interviewees was a pertinent factor to consider. Older people tend to die at times not convenient for the research! For the Glasgow study especially, the drop-off in numbers of interviewees for a final dialogue was detrimental, related to the longitudinal aspect of the research. This signals the importance of strategies to minimise this reality in dealing with *old-old* participants and of having well thought-out contingencies.

The two research projects were somewhat different in focus and scope (primarily older people as members of established social agencies in the New Zealand study; working-class people in the case of the Scottish study), but both in mainly an urban context. In particular, the Scottish project was funded by an outside Government-funded agency concerned about the access of marginalised adults to further education. The project was much more located politically in the Scottish Executive's concerns for social inclusion (marginalisation). One result of the Greater Glasgow study was to demonstrate that the financial Governmental assistance provided to working-class students was having a positive effect, and that even more working-class people might overcome their traditional fear of higher education (Tett, 2004) if more funding were to be made available for innovative recruitment. Quite clearly, at the time of this study, the Scottish Government's initiatives around widening access to adult education/lifelong learning were largely successful. In the case of New Zealand older adult education, we wait in vain for an enlightened policy on encouraging older people into polytechnics and universities (Findsen, 2017).

In summary, this chapter has discussed some emergent issues of research connected with older adults' learning/education. Initially, it posed the question as to whom the label *older adult* applied, concluding that definitions need to be specific and context-related. Ageist viewpoints based primarily on myths need to be constantly challenged. In both the investigations reported above, the relative failure of higher education to embrace older adult education, apart from some non-credit provision, is transparent, and especially the absence of ethnic diversity among older adults is very stark (Oduaran & Bhola, 2006). The situation of how ethnicity intersects with social class needs to be better disentangled, as in many instances ethnic minorities (e.g., Māori) are disproportionately among the poorest citizens (Phillipson, 1998). While in many instances older adults engage in informal and non-formal learning without fanfare, it is in the realm of formal education that older people have simply been neglected by both providers and government. Stronger lifelong learning and active ageing policies are required from governments with corresponding resource allocation. As researchers, we can provide the methodological tools and evidence base for much of this decision-making.

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Traversing the Dark Geography of Retirement: Learnings from Ethical and Reciprocal Research Conducted with the Older Male in Australia

Deborah L. Mulligan

Abstract Every day in 2016, more than two Australian men aged over 50 took their lives, and more than one Australian man aged over 60 took his life. Contemporary ageing studies have focused predominantly on the needs of women, and younger and middle-aged men. Scant research has been conducted into ageing and the specific needs of marginalised older men.

This chapter draws on information gleaned when researching for my PhD thesis. Relational links between the concepts of gender bias, research processes and older men are discussed. Some solutions to the ethical challenges of an older woman investigating retired older men in all-male environments such as Men's Sheds and The Older Men's Network (TOMNET) are presented. These solutions revolve around the notions of researcher reciprocity and situated ethics.

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Introduction

How can education researchers contribute to help marginalised groups communicate their experiences and articulate their voices? In order to speak to this, my theoretical base focuses on the supposition that retired older men experience barriers to learning as they age and that their voices have been historically silenced (albeit possibly largely self-imposed) thus resulting in a state of marginalisation. This situation is due to a number of factors which may include adherence to toxic traditional stereotypical masculine norms such as "real men don't show their emotions"; "real men don't complain, they just get on with it" (Salam, 2019).

Older men, as referenced in this chapter, are considered to be men over the age of 50 years. At this age in Australia, people are eligible to join seniors' groups and organisations (such as National Seniors Australia). Fifty is also perceived to be the entrance to the "third age" or the retirement phase (Cusack & Thompson, 1999, p. xi). Scant research has been conducted into ageing and the specific needs of older men as they engage with retirement.

Dellemain, Hodgkin, and Warburton (2017) referred to "dark geographies" (p. 50) when researching rural health case workers and the impact of distance and isolated environments on their physical and emotional welfare. I have extrapolated the notion of physical dark geography to reference it as a landscape of the mind focusing on the terrain of the psychologically isolating factors of retirement from paid employment.

Research constitutes an ethical process of systematic inquiry. As an older woman, I was cognisant that I was entering highly masculinized and informal environments which "may presume that being a woman inherently challenges the credibility of my work with men and about masculinities" (Lefkowich, 2019, p. 1). With this concept in mind, I consciously and intentionally adopted a more flexible and reflexive stance. Situated ethics played a large role in my approach to collecting research

data that focused on a qualitative, interpretive, multi-site case study conducted with a view to presenting an analysis of the lived experiences and multiple truths of older men's ageing and learning experiences post retirement. I adhered to the notion that: "all ethical acts are constructed and practised in particular contexts where researchers make *in situ* decisions" (Ebrahim, 2007, p. 289). My research focused on building an authentic collaboration (based on trust and respect) between the researcher (myself) and the participants (older men) that was advantageous for both parties.

Moore (2004) argued that mutuality should be a key feature of the researcher–participant relationship in order to "create a fertile and supportive environment" (p. 111) that is conducive to the generation of rich data. The researcher has a responsibility to create an environment in which the participant feels comfortable. In so doing, a level of mutual trust is engendered. Trainor and Bouchard (2012) advanced the argument of reciprocity when they posited that researchers are reliant on participants to inform and shape the study by volunteering their "time, effort, experiences and wisdom" (n.p.).

Thus, I began my research with the following research parameters:

- Gender bias and pre-existing assumptions by the researcher around power and credibility should be consciously reflected upon regularly throughout the whole process of the thesis writing, not just during data collection
- Pre-existing assumptional gender norms held by my target research cohort should be acknowledged and addressed when possible
- Reflexivity and respect are paramount—from all stakeholders
- Interviewees donate their time and involvement in the research project and as such the knowledge they bring to the study should be recognised and valued
- The researcher has been invited to enter male dominated spaces and as such should adhere to the protocols and etiquettes of those organisations
- One voice or opinion should speak no more loudly than another.

This chapter offers brief insights into how I conducted research with a marginalised group. Initially I provide a background to my research topic. I then go on to discuss the research design that I implemented with an

intentional focus on accommodating the idiosyncrasies of my targeted group. Considerations are then presented with a view to the notion of situated ethics. Finally, I conclude with a number of recommendations for those who are interested in investigating marginalised cohorts.

Background

Cusack and Thompson (1999) maintained that old age is socially constructed and that biases such as stereotypes impose limitations on the possibilities for personal growth and individualism. They posited that these types of assumptions have to do with the nature of retirement and ageing. In both cases, they proposed that the general attitude of older members in society is that they are a non-productive drain on the community and that they are forever trying to "recover lost youth" (p. 21).

Butler (2015) contended that negative stereotypes to do with ageing and old age are "crafted and reinforced in our cultural sector—the media, advertising and entertainment industries" (p. 50). He asserted that these industries need to look beyond merely endorsing funeral insurance, and that their fixation on the promotion of youth no longer reflects the reality of an ageing population.

Dr Anthony Brown (the Australian Men's Health Forum) referred to the three negative stereotypes of ageing and retirement associated with older men:

1. "You're on the scrapheap", which reflects feelings of worthlessness after paid work has ceased;
2. "The underfoot husband", which signifies feelings of displacement and partner relationship disruption after work has ceased; and
3. "The rocking chair on the verandah", where men are "out of sight, out of mind and waiting to die". (Ryan, 2017)

Brown stated that men unconsciously believe these negative stereotypes: "Once you retire, you withdraw, and it's just decline and decay from then on. There's this idea that, if you're retired and you're a bloke, well then, that's it, you're past your prime" (Ryan, 2017).

Based on these theories of negative stereotypical biases and assumptions, it is my contention that retired men are in grave danger of self-marginalisation and, in so doing, forfeit their ability to be learners and to be active members of society.

Danaher, Cook, Danaher, Coombes, and Danaher (2013) suggested that: "Sociocultural marginalization assumes many forms and has multiple causes and effects" (p. 3). With this in mind, the marginalisation of older men may include such concepts as ageing (Barnhart, 2012; Cain, 2012), gender (Beales & Petersen, 1999), mental illness (Author unknown, n.d.) and rurality (Tynan, McDermot, Mactaggart, & Gericke, 2015).

Building on the complex nature of marginalisation and adapting it to the framework of this paper, I have hypothesised the following:

Marginalisation is the conscious conduct or attitude towards a group or concept as having a less significant or unimportant value as considered by other members of the community.

The 'group' refers to older men and the 'concept' refers to old age. I have considered these factors that influence marginalisation:

- Marginalisation may take the form of adherence to traditional and outmoded assumptions and opinions. These notions reinforce traditional stereotypes that are unhelpful and that can be destructive to those targeted.
- The deleterious effects of marginalisation include destructive feelings of loneliness and social isolation as well as loss of identity and self-esteem, all of which may culminate in suicidal ideation and practices.

Based on the vulnerability of the target research group, it was particularly important that the research design provided a flexible delivery and a nonbiased approach that allowed for the articulation of individual voices and not simplify their journeys through a 'one size fits all' approach.

The Research Design

Elements of the research design included philosophical underpinnings of the study, methodology and data gathering.

"Interpretivist positions are founded on the theoretical belief that reality is socially constructed and fluid. Thus, what we know is always negotiated within cultures, social settings, and relationship with other people" (Cohen & Crabtree, 2006, n.p.). Rigorous research is based on philosophical assumptions to do with the authentic pursuit of the development of knowledge and suitable methodological processes. Interpretivist researchers strive to understand the experiences and commonalities that are grounded within the contexts of people's lives. Particularised research questions that relate to existence (ontology), ethics (axiology) and truth (epistemology) are posed and reflected upon by the researcher throughout the investigative process.

The ontological assumption of multiple truths and multiple realities was embraced by the researcher. This notion of individuality underpins the belief that "persons understand reality in different ways that reflect individual perspectives" (Erlingsson & Brysiewicz, 2013, n.p.). My research position is one that disavows the theory of a 'grand narrative' that assumes the existence of one all-encompassing existential truth that can be applied to old age.

The axiological notion of values was an important facet of my research (Somekh et al., 2011). It is an 'easy fix' for society and politicians to assume that all older men are the same and have similar life values. Traditions, family circumstances and personal histories are just three of the multitude of components that play an integral role in the formation and the reformation of values for every individual.

Epistemologically, the existence of multiple truths is dependent upon the individual's interpretation of reality. Gough (2002) noted that the researcher becomes an empathetic observer who is encouraged to immerse herself fully in the process in a subjective manner (p. 6). The idea of social constructs is a compelling one and relevant to my inquiry into older men and how they position themselves within the community and their interpretation of societal truths/norms.

Cohen and Crabtree (2006) claimed that, as part of an interpretivist paradigm, "truth is negotiated through dialogue" (n.p.). It is via this dialectical process that a more knowledgeable and comprehensive perception of the social world can be established. These interpretations are fluid, and they are located as being contextually particularised within time and place. Conversation invites the re-interpretation and negotiation of truth.

Merriam (2009) noted that the methodological approach of qualitative case study has three distinct facets. It is "particularistic" in its targeting of a specific phenomenon; it is "descriptive" in that its end result is replete with a rich description of the process; and it is "heuristic" in that it enlightens the reader's knowledge of the phenomenon (p. 46). Multisite case studies focus on the same research questions in a variety of locations. "They consciously seek to permit cross-site comparison without necessarily sacrificing with-in site understanding" (Herriott & Firestone, 1983, p. 14).

My data gathering was conducted in two male-only umbrella organisations in and around South East and South West Queensland, Australia. These were The Older Men's Network (TOMNET) and various Men's Sheds.

TOMNET is an organisation based in Toowoomba, Queensland, Australia. It was established in 2001 by a small group of older men to mitigate suicide ideation for males aged over 50 years. TOMNET believes that older men are the social "forgotten generation" (tomnet.org.au/), which results in detrimental self-isolation which in turn may lead to suicide ideation.

It is difficult to provide a definitive definition of a Men's Shed as each one is unique to the demands of the grassroots membership. However broadly speaking, a Men's Shed is an accessible community, not-for-profit organisation that welcomes all men who wish to work "shoulder to shoulder" with other men (mensshed.org/what-is-a-mens-shed/). Nine Men's Sheds were approached and accepted my request for on-site data gathering. As per the gender requirements of the study, no Men's Sheds with women members were approached.

Three phases of data collection occurred. Sources consisted of the examination of archival and current data, and an initial paper and pen Likert scale survey (Phase 1); semi-structured interviews (Phase 2); focus

groups (Phase 3); notes derived from fieldwork observations (Phases 2 and 3); and a reflection journal kept throughout the process (Phases 1, 2 and 3). In keeping with the holistic nature of data collection in the case study, and to keep up to date with current theory in this area, document analysis occurred from the conception of the research idea and was ongoing throughout the investigative process (Phases 1, 2 and 3).

Phase 1 surveys were conducted during morning tea breaks and were not obligatory. Declining to complete the survey was accepted and respected. Assistance to complete the survey was offered at each site by peers.

Phase 2 interviews were conducted at a venue chosen by the interviewee. A fact sheet was sent or delivered to the interviewees prior to each interview session. It outlined the research questions; presented the aims of the study; provided a very brief context of the study; included some sample interview questions; and contained my contact details. This sheet was designed to serve multiple purposes. Firstly, it provided a background to the study. Secondly, sample questions ensured that the interviewee was not caught unawares during the interview, as well as providing food for thought prior to the interview. Finally, if, after reading the fact sheet, the interviewee decided not to participate in the study, he could contact me directly.

Phase 3 focus group participants were self-selected. They ranged from two to fifteen participants. Each focus group session was conducted with members of both TOMNET and Men's Sheds separately and at a later date than the surveys. This provided a hiatus between research interactions which enabled a 'think time' for my participants. By that stage, they were familiar with me and my research intent, thus engendering feelings of shared understanding and assumption.

Before physically approaching TOMNET or the Men's Sheds, I telephoned or emailed the co-ordinators of each organisation and asked if they and their members would be interested in participating in the research project. Contact details were obtained using publicly available information such as websites. This ensured that protocols were adhered to and demonstrated respect for the organisation.

Throughout the research process, I was aware of the unique invitation extended by my participants. Responsible researcher positioning

demanded that my role be as transparent and rigorous as possible. To ensure this occurred I abided by the ethical codes outlined by my university whilst allowing for the situational diversity of the organisations involved in my data gathering.

Upon the conclusion of my study, I returned to each of the cohort organisations with 'gifts'. I produced a handout booklet that summarised my findings. This created a lot of discussion and signalled to my participants that I valued their input and the serious intent of the investigation. I also took multiple boxes of chocolates to each location when I presented the booklets. These represented a token of my appreciation and were very well received.

Research Ethics

During the course of the investigation, I was sensitive to the existence of my own personal biases and subjectivities to do with lifestyle practices. As a female researcher conducting an exploration in 'a man's world', I was aware of gender assumptions to do with stereotypes, masculinity and ageing. I was also aware that the male participants may have possessed gender assumptions of their own to do with stereotypes, power and socio-economic status/education.

I attempted to engender a positive and ethically responsible researcher–participant relationship when conducting surveys, interviews and focus groups through the following avenues:

- *I assured the participant of my serious intent* by making appointments at least a week beforehand and at a time convenient to the participant. Appointments were made over the phone, in person or by means of email—however the respondent felt comfortable communicating.
- *I ensured the comfort of the interviewees* by allowing them to select the venue. I made myself flexible enough to cater for individual/group needs as I wanted the participants to feel comfortable in a familiar/non-threatening environment. Several of my interviews were conducted at the participants' homes. If the participant(s) wished to meet on neutral territory, I made arrangements for a meeting room to be

booked and available at the local library, which was centrally positioned in town. I also went to work offices and buildings situated within the Men's Sheds grounds.

- *I maintained professionalism* by arriving at least 15 minutes before the allotted interview time to ensure that the venue was suitable in terms of ease of conversation. During this time, I checked the efficacy of my recording devices.
- *I always adhered to the ethical requirements* of the university and I explained my research proposal, provided and discussed the participation information sheet and elicited a signature on the interview consent form. I did not coerce any individual into participating, and I emphasised the anonymity of each respondent. Transcripts were securely stored.
- *I established rapport* during the interview by beginning with generalised conversation. Prior to the formalised interview, I also presented the participant with chocolates as a thank you gift for their time and any inconvenience that I may have caused them.
- *I supported the interviewees* throughout the conversation by enabling them to reflect and continue with a train of thought for as long as they needed. I did not shut the conversation down at any allotted time.
- *I followed the protocols* of each organisation. When interviewing members of TOMNET, I sought permission from the general manager before I approached the prospective interviewees. When conducting the Likert scale survey, I applied to the management board for a convenient time at which to attend one of the general meetings. I waited until I was invited to present my survey, and I left upon its conclusion, thereby honouring the privacy of the meeting.
- *I upheld the integrity and impartiality of the research process* by not accepting gifts from any of the participants. I dressed appropriately, and I was aware of my personal conduct at all times.
- *I was cognisant of my own safety at all times*. When conducting interviews/focus groups, I always ensured that I was not left alone with only one or two participants and I always communicated my schedule to a third party not involved in my research.

The delivery of the Likert scale survey was an example of situated ethics in action where formalised rules of conduct and social interaction were impediments to authenticity. The complexity of the situation demanded an alternative, 'in situ' ethical code. The age of the participants and the location of the implementation of the survey were considerable mitigating factors in delivery. To complete the survey task, the researcher had to account for the following:

- Some men were illiterate and did not want anyone to know, so they just ticked any box.
- Some men had disabilities—blind, deaf, dementia—and had to have peer support. This consisted of speaking loudly to one another for clarification and secondary explanations from the supporting male.
- Some men were rowdy and spoke over the top of one another and/or the facilitator—explanations were ignored or lost.
- Some men completed the survey before the facilitator had finished the explanation and filled it in incorrectly.
- Some men did not understand the degrees of agreement and were confused by the survey itself.
- Some men wrote words in the boxes instead of ticking them.
- Some men who needed help filling in the survey may not have revealed their true feelings in front of another male.
- Some men came in late and disrupted the flow of completion of the survey.
- It took a substantial amount of time to become settled before beginning the survey as it was either their morning tea time (Men's Sheds) or they had moved to a position in which to complete the survey comfortably (TOMNET).
- Some men threw pens at one another when they had finished.

It should be noted that I detected no intent of malice directed towards me from the men. They simply appeared to be enjoying one another's company in a familiar and comfortable environment. I acknowledged and respected the fact that they had allowed me into their social group for that length of time.

Morris (2015) discussed the impersonal nature of an interview, particularly when the researcher and the interviewee are strangers and have no prior relationship on which to build a comfortable interview environment. These sentiments are pertinent to the ethical dilemmas included in a middle-aged, white female interviewing a previously unknown older male about his perception of himself and his reality.

The following aspects of contact were experienced in the interviews:

- Initially, the formality of the situation seemed awkward for some of the interviewees, so we chatted about inconsequential subjects before beginning the interview proper.
- Owing to the subjective, self-reflective nature of the interview questions, 'wait time' for the answers to some of my questions was a protracted experience. At times, it necessitated the researcher to prompt in the form of the repetition of words/phrases or affirmations such as "You're doing really well. Thank you again for giving up your time."
- Another by-product of the personal nature of the questions was that some of the men did not have the skills or temperament for self-reflection and the associated use of expressive lexicon. It was not that they did not want to give an honest answer; it was that they did not have the vocabulary to do so.
- A few of the older men preferred not to speak about their experiences of ageing directly but would cite examples of incidents that had occurred to their friends. They were happy to critique situations as from a distance.

I dealt with the above limitations by transcribing the interviews straightaway and by recording any observations that I may have made during the interview. These transcriptional notes were then placed in a secure location. I assured each interviewee of his anonymity, and during the transcription process I applied a pseudonym to each participant.

The focus groups were attended by between two and 15 men. At times, a group was in progress and other men randomly decided to join the discussion. In these situations, I did not limit participation. The focus

groups were conducted formally and with serious intent on the part of the participants. They wanted to be heard.

Conclusion

Researching with marginalised groups is potentially a risky endeavour. Ethical challenges abound. Irresponsible methodology could lead to serious ramifications on an already socially excluded and vulnerable group. Danaher et al. (2013) warned that lack of authenticity and academic rigour could lead to misunderstandings, misrepresentations and damaged reputations, and could harm the very group that it was supposed to assist (p. 125). Cohen and Crabtree (2006) listed three considerations when seeking to ensure ethical rigour. The researcher should ask herself the following questions:

- Is the research beneficial to the targeted group?
- Are there alternative explanations for findings and have these been challenged and acknowledged?
- Have you actually contributed to the subject knowledge base? (n.p.)

  I would add another, more fundamental question:

- Did you build a substantial relationship with your participants that was meaningful not only for your research, but for the individual(s) with whom you interacted?

  It is in this spirit of reciprocity that I would offer up the following recommendations when conducting research with marginalised groups:

- Exercise due diligence before approaching research participants. Explore the history of the cohort and the road that led to their marginalisation. Respect the journey that they have been on and try to value add to their future through your study.

- Select an appropriate research design. Be cognisant of your philosophical stance and ensure that your epistemological, axiological and ontological assumptions align with the practicalities of your investigation.
- Practise situated ethics. Value the research environment(s) and adapt accordingly.
- Be cognisant of particular circumstantial issues in order to render articulation to all voices in a rigorous and authentic manner.
- Remain aware of participant limitations and engage in such a manner that these do not overshadow your data gathering.
- Acknowledge biases and pre-existing assumptions on the parts of both the researcher and the participants. Strategise to ensure impartiality.
- Ensure mutuality through respect and patience. Interaction in the form of interviews and focus groups should be consistent and transparent.
- Follow organisational protocols and remain self-aware. Inappropriate behaviour (whether intentional or not) will prejudice your findings.
- Reciprocate if possible. Demonstrate your appreciation to the participants for their time and investment in your study.

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18

Learning Through Uncertainty: A Phenomenological Analysis of Older, Professional Men Coping with Involuntary Job Loss in the United States

Brian S. Hentz

Abstract The global recession caused scores of professionals to experience involuntary job loss. Unlike the case in prior financial downturns, men—especially older, professional men (i.e., aged 50+ whose employment required four-year college degrees)—in the United States suffered their fair share of job losses. To explore how this population coped adaptively with involuntary job loss, I conducted a phenomenological study of men across a range of professions who fitted this profile. Findings suggested that the older men who cope adaptively with this phenomenon demonstrate more developmentally complex ways of meaning-making. Such men viewed themselves as 'narratives' with subsequent chapters to

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be written, and were more likely to seek out actively others who also lost jobs (i.e., 'rugged interdependence') to further their goals moving forward.

Keywords Adaptive coping • Older adults • Phenomenology • Unemployment

Introduction

In this chapter, I use a phenomenological framework to explore how older, professional men in the United States make meaning and, hence, cope adaptively with an unexpected life transition: involuntary job loss. The global financial crisis of 2008–2009 caused scores of professionals to experience job loss. In stark contrast to prior downturns, however, a large number of professional men—especially those over age 50 whose employment requires a 4-year college degree—lost jobs (Rampell, 2009). Dubbed the "mancession" (Marin & Dokoupil, 2011), the phenomenon reflects the relative novelty of professional men losing jobs with such frequency.

Forced, involuntary job loss can trigger a major life transition, and coping adaptively with a major life transition can challenge adults to make meaning of their circumstances. Because learning is an integral part of making meaning of lived experiences (Jarvis, 2007), men experiencing later-life job loss may require more complex ways of meaning-making, especially as they may encounter a "crisis in unknowing" (Bauman, 2007). The novel phenomenon of the 'mancession' placed this particular population on the educational margins, as they reflexively explored their understanding of the institutional life course and, in so doing, came to terms with the realization that their seemingly 'too old to be rehired, too young to retire' status required them to embrace the uncertainties that underpinned an unexpected life course transition.

A related problematic aspect of this phenomenon is the relative absence of learning supports to help this group of men learn through the uncertainty of involuntary job loss and, in turn, help them learn to cope adaptively with this life transition. Retraining and recareering opportunities

for older, unemployed might exist, but there is no certainty that employers would be willing to employ such men. Hence, learning supports are required to help this population cope adaptively with this life transition, especially in ways that transcend instrumental and/or technical approaches to simply 'getting a job' in a rapidly changing lifeworld.

A challenge for educators who help older men explore new directions for their lives following job loss, then, is to understand how these men learn from and through their circumstances. To that end, this phenomenological study was guided by these research questions: What is the meaning that older, professional men make in coping with involuntary job loss? How does this population cope with involuntary job loss? What role does learning—especially informal learning—play in this coping process? A phenomenological methodology, in particular, allowed participants in this study to more fully articulate their respective experiences in learning on the margins: as professionals faced with making meaning of the uncertainties accompanying involuntary job loss in later life. To the extent that participants did not anticipate coping with such a phenomenon in their lives, job loss offered participants an educative challenge that foregrounded the limits of their present ways of knowing.

Conceptual Framework

This study's conceptual framework consists of several interrelated behavioral attributes that influence how adults appraise job loss. In particular, 'coping' refers to cognitive and behavioral efforts to manage demands associated with situations that tax or exceed an adult's resources (Lazarus & Folkman, 1984).

The literature on coping and job loss confirms that adults who cope adaptively with job loss demonstrate behaviors that reflect higher levels of cognitive well-being, or an adult's thoughts about a life event or situation. Adults who demonstrate higher levels of cognitive well-being demonstrate, for example, a strong sense of coherence (i.e., a strong sense of self and one's life story) (Diehl & Hay, 2010), optimism about the future (McKee-Ryan, Song, Wanberg, & Kinicki, 2005), and a problem-focused orientation to the loss (Sadeh & Karniol, 2012).

Also, adults who cope adaptively with job loss demonstrate higher levels of affective well-being, using their emotional responses positively to promote a problem-focused orientation. Positive emotions tend to broaden individuals' meaning-making, leading to more creative actions and responses to unanticipated life events (Frederickson, 2001). That said, the emotional shock of unexpected job loss appears to heighten the influence of affective well-being on subjective (or overall) well-being for adults coping with job loss (Vickers & Parris, 2007).

The literature also suggests that adults who cope adaptively with job loss use time in ways that promote higher levels of cognitive and affective well-being. Although unemployed adults who make more structured use of time reported higher levels of well-being (Ranzijn, Carson, Winefield, & Price, 2006), actively engaging in job search was actually found to be correlated with lower mental health among the unemployed, for constant rejections created additional stress (McKee-Ryan et al., 2005). Hence, although unemployed adults who make more structured use of their time tend to cope more adaptively, time devoted solely to job search does not necessarily lead to higher levels of cognitive or affective well-being.

Finally, adults who cope adaptively with job loss benefit from others' presence and support. Adults with ample social supports reported higher levels of life satisfaction (McKee-Ryan et al., 2005), and adults with dependable systems of support—be it family (Forret, Sullivan, & Mainiero, 2010) or extended community (Martella & Maass, 2000)—coped more adaptively with job loss.

Methodology and Methods

In this qualitative study, I followed a phenomenological design of inquiry, in order to describe the essence of participants' lived experiences with respect to coping with involuntary job loss. As both a philosophical and empirical approach to understanding participants' felt experience of a specific phenomenon (Giorgi, 1985; Husserl, 1970), phenomenology offers "the strengths of qualitative research [that] derive primarily from its inductive approach, its focus on specific situations or people, and its emphasis on words rather than numbers" (Maxwell, 2005, p. 22). Because

phenomenology helps researchers gain a deeper understanding of the meaning of everyday experiences (van Manen, 1990), this methodology was particularly well suited to explore the lived experience of older, professional men coping with involuntary job loss. Moreover, with respect to the phenomenon of job loss in later life, this study intended to fulfill a primary objective of phenomenological research: to "address what it is like to be, to have, or to live" (Sandelowski, 2008, p. 787).

The target population for this study was men over age 50 with a (minimum) bachelor's degree (to signal 'professional' status) who experienced involuntary job loss since turning 50. I used this baseline age to designate 'older', based upon the U.S. ideological apparatus (Althusser, 1971) that uses an adult's age as a benchmark for 'older' (e.g., the American Association for Retired Persons advocates for the 50 and over population (AARP, 2013)). In addition, participants needed to have: (a) experienced their involuntary job loss in the past 5 years (to reflect the aftermath of the 2008 global financial crisis); (b) lost salaried (i.e., non-hourly wage) positions; and, (c) worked at least 5 years with the employer who terminated employment (Table 18.1).

Following Seidman (2005), I conducted three in-depth interviews with each participant. For this study, I used inductive analysis, which allowed me to identify patterns across the data (Creswell, 2014), and then proceeded with open coding (Glaser, 1978). Using constant comparative analysis (Creswell, 2014), I then collapsed codes into categories that, in turn, coalesced into key themes. To identify these themes, I

Table 18.1 Participant profiles

Name	Age	Profession	Age at job loss	Time at last job
Scott	54	Wholesale Distributor	50	5 years
Rick	63	Research Scientist	59	17 years
Ethan	61	HR Benefits Manager	59	9 years
Todd	59	Senior IT Director	59	7 years
Steve	72	Sales Engineering CEO	67	22 years
Ken	71	Engineer/Scientist	70	38 years
Chris	65	Accountant	63	14 years
Ian	60	HR Director	58	28 years
Roger	60	Church Choral Director	55	13 years
Tim	52	Journalist	51	22 years

engaged in axial coding (Strauss & Corbin, 1998) to examine how substantive categories across my data interrelated.

Findings

Firstly, older, professional men who coped with involuntary job loss needed time to adjust, but came to see their newly acquired time as an asset that helped them think creatively and create value differently. Although participants may have lost a time structure to their lives that their employment previously provided, they perceived their newfound time outside of the market economy as a 'gift', offering them space to engage with their communities—and, indeed, themselves—in creative ways that not only enhanced job search, but also their well-being.

Some participants used their newfound time to engage and explore ideas—especially through self-directed reading—that helped them appraise their situations. Tim, a former journalist for a mid-sized regional newspaper, said "I think you just need the time to remind yourself about the bigger picture" (lines 16773–16774), and he found respite in reading "lots of histories and biographies of late. I just find it interesting to read about how others fared through challenging times and how history has played itself out across time" (lines 16537–16540).

Other men valued the ways that their 'gift' of time helped them explore new, creative ways to position themselves as job applicants. Rick, an accomplished research fellow scientist, developed a data-intensive method to help him chart accurately the extent to which his time use most efficiently helped him secure promising job leads and interviews. Ian, meanwhile, saw volunteer opportunities as a way to serve his community as well as seek new work: "these volunteer opportunities may open up new job opportunities" (lines 13523–13524).

This finding enhances our understanding of coping and job loss by underscoring the importance of leisure to meaning-making with respect to this unanticipated life transition. Leisure, classically understood, is time devoted to contemplation and music, the latter more broadly conceived as the act of creation and play (de Grazia, 1962). For participants who used their newfound time to read, their reading served a 'playful'

purpose: to help them take a broader perspective on their circumstances, as they explored how others throughout history handled adversity. Leisure, then, reflects a particular type of time use that was central to men's coping adaptively with involuntary job loss. In defending what he calls "useful unemployment", Illych (1978) argued that "most of the time we find ourselves out of touch with our world, out of sight of those for whom we work, out of tune with what we feel" (p. 11). Men who coped adaptively used time to think—and, hence, to learn—by engaging in introspection, which promoted higher levels of cognitive well-being for these participants on the educational margins.

Secondly, older, professional men who coped with involuntary job loss felt an initial loss of stability in their lives, but came to see that focusing their attention on aspects of their lives that they could control helped them remain optimistic about the future. Despite the loss of a perceived stability to their lives, men coped adaptively by focusing their attention on actions that they assessed as solely under their control, and they came to understand that managing their attention this way helped them think positively about their circumstances.

Participants maintained a set of realistic expectations as they prepared to seek future employment. Tim confessed that "no one's knocking on the door for a seasoned reporter in his 50s; nada, not happening" (lines 15920–15922), and Roger conveyed that "my expectations are lower, in terms of salary and responsibilities and challenges" (lines 14832–14833), adding that simply securing any type of employment would be preferable to none.

To avoid dwelling on negative aspects of their situations, participants coped adaptively by demonstrating negative visualization, taking pause to express gratitude and recognize that their lives could be in much worse shape. Ian believed that he hadn't been handed anything he couldn't handle, disclosing that "part of it is patience" (line 13451). Chris's gratitude emerged when he placed his own challenges in a broader, global context, as he shared that "people are dying all over the world. … I don't think I could have the nerve to be depressed" (lines 12213–12219).

Because participants sensed that age bias was a particular reality they needed to address as job candidates, they focused their attention on job search strategies that they could control to combat this bias. Roger

highlighted only current activity in his job search materials, because "it looks like you're able to step into something and take on new things without being so set in your ways" (lines 14689–14691), and Ken shared that he "[doesn't] put the years down for my education" (line 10326). Finally, Scott admitted that he "had to think of how to make age an asset" (lines 933–934).

To cope adaptively with job loss, then, men used positive emotions to promote curiosity and a positive future outlook. This problem-focused orientation helped men to perceive their job loss as an interesting challenge. Adults who understand a phenomenon as an adaptive challenge demonstrate a learning orientation (Heifitz, 1994), and men in my study framed their understanding of their situation as a growth opportunity (Dweck, 2006). Rather than dwell on negative aspects of job loss, men who coped adaptively in my study perceived job loss as a challenging life transition that required a curious and positive outlook.

Thirdly, older, professional men who coped with involuntary job loss came to understand their disrupted lives were open to restorying, as they envisioned 'future chapters' in their lives could be written. By remaining open to new meaning-making possibilities in later life, men accepted that the changing society in which they lived invited—indeed, demanded—them to change as well.

Men revealed that obtaining new work required them to discard former ways of knowing. Ian, for example, said that, in this highly competitive job market, online applications amounted to "just an exercise in futility" (line 13432), and Tim admitted that he's "been smart enough to toss out all the old rules about job search" (lines 16045–16046). Hence, men recognized that rebounding from job loss in a culture in which the nature of work was changing required them to think differently about the usual 'script' on how to obtain new employment.

Participants remained largely open to new possibilities for employment. Todd revealed that he is "starting to think more and more that looking at jobs is the wrong approach. … I'm really looking for a situation, not looking for a job" (lines 8178–8180). Scott revealed "I knew I always had to have multiple irons in the fire" (line 433), and he discussed the prospects of pursuing a range of consulting ventures during his job search.

Men also perceived that they did not—indeed, were not compelled to—let go of their professional identities, despite their respective job losses. Roger even conceded that "my idea of career has been changing; I don't know exactly what to think of what a career is" (lines 14160–14161). Scott said that, even though he was challenged to find new work in his field of expertise, he believed that "I'm still me; I still have all those skills … it didn't go away" (lines 1115–1117).

Men who coped adaptively with involuntary job loss demonstrated an openness to restorying their lives, even if they were uncertain what that transition might entail. Human identity can be conceived as a life story, or "an internalized and evolving personal myth that functions to provide life with unity and purpose" (McAdams, 1996, p. 132). Older men who lose jobs experience a disruption in their life stories; however, those who cope adaptively remain open to restorying their lives with new 'chapters', thereby contesting a narrative of decline (Gullette, 1997) that envelops aging in America. Men who coped adaptively with job loss resisted a narrative disclosure (Bohlmeijer, Westehof, Randall, Tromp, & Kenyon, 2011) to their lives, and remained open to possible future selves (Markus & Nurius, 1986). Higher levels of cognitive well-being promoted this openness to generativity that is central to adults' developmental growth in later life (Levinson, 1986; Valliant, 2002). By recognizing habits of mind—what Bourdieu (1990) calls *habitus*—and thought patterns that comprise their "unconscious programming", men who coped adaptively with job loss reflected on their own meaning-making to ensure that they themselves, as Tim said, were "not the barrier" (line 16487) to making positive meaning of their situation.

Finally, older, professional men who coped with involuntary job loss surrendered to the limits of 'rugged individualism' in their quest to move forward with their lives, instead embracing a 'rugged interdependence' as they learned from—and remained accountable to—others coping with the same life transition.

Participants discussed their reluctance to rely upon others for assistance as they sought to move forward with their lives following involuntary job loss. Ethan shared that "even if it's somebody I know, I just don't like imposing on people" (lines 6339–6340), and Todd summed up his assessment of networking as "it's so darn phony" (line 7673).

By contrast, men spoke enthusiastically about particular types of networking groups that resonated with them in ways that traditional networking did not. Ethan said that "in each of these networking groups, it's important and expected to help each other. That's really the focus of the entire group: to help each other as much as possible" (lines 6212–6214). Rick echoed Ethan's thoughts, when he said that "if I see a lead, if I see a job with your name on it, then I send it to you. And, you know, it's kind of the 'pay forward' thing" (lines 4074–4075). Men also shared that learning through others' experiences strengthened their own outlook—and creativity. For example, Ethan shared that "another benefit to these groups is that you learn what other people are going through in terms of what their challenges are" (lines 6227–6228). Rick appreciated that his group experiences promoted his creativity, which he believed gave him "a stimulus to innovate" (line 5084).

My finding that men who coped adaptively with job loss self-regulated their participation in new social networks—to ensure that they learned something and that their participation was perceived as a worthwhile investment of their time—extends our understanding of coping and job loss in that men who perceive social networks as beneficial become active participants in creating the learning conditions in these networks. Men who self-regulated their contributions to these groups demonstrated higher levels of cognitive well-being, which promoted adaptive coping and meaning-making during their transition.

In sum, older, professional men who coped adaptively with involuntary job loss made use of social supports to help them learn through the uncertainties that accompany involuntary job loss. These learning relationships—grounded in mutuality and interdependence—promoted higher cognitive and affective well-being that supported adaptive coping. Men who coped adaptively engaged in communities of mutuality, and strong, intimate relationships among members supported the perceived quality of informal learning in these groups. Men used social supports to learn new job search strategies and to explore new directions in their lives following job loss, and this optimistic future outlook and positive response to an unexpected life challenge led to greater positive meaning-making.

Conclusion

Men who coped adaptively with later-life job loss demonstrated more developmentally complex ways of meaning-making. Despite the loss of a time structure to their lives that employment once offered, men saw their newfound time as a 'gift' that could help them broaden their meaning-making. Also, emotional self-regulation promoted high levels of cognitive well-being for men who coped adaptively, as they maintained a problem-focused orientation and avoided emotion-focused, unrealistic responses to life after job loss. Finally, men who coped adaptively 'grieved well': they accepted not only the loss of their jobs themselves, but also the loss of ways of knowing that formerly helped them make sense of their professional lives. Men who 'grieved well' made use of learning relationships grounded in mutuality and interdependence to learn through the uncertainties of later-life job loss.

Implications for Practice

Because adults may be challenged to make optimal use of time outside the structure of employment, educators can help adults learn to self-regulate their time use as they search for new work and new engagement in their communities, for the latter not only creates value for the communities in which adults live, but also enhances adults' overall well-being. Also, because a strong sense of coherence promotes adaptive coping (Randall, 1996), educators can encourage older adults coping with job loss to acknowledge and honor their storied lives as they explore new possible directions in their lives. Finally, educators can engage adults in intentional 'grief work' as part of the coping process; learning contexts grounded in mutual social supports can promote this grief work.

Future Research

The extent to which individuals cope adaptively with loss will depend upon their life experiences and the contexts in which their lives unfolded. Men in this study fit a limited profile: all were Caucasian and of European

descent, and a wide spectrum of identities (e.g., race, ethnicity) were not taken into account during this study's recruitment or analyses processes. Future studies that take these identities into account will enhance understanding of this problem.

Final Thoughts

In *The Human Condition* (1958), Hannah Arendt lamented that adults in industrialized societies were conditioned to think of themselves primarily as laborers. In contrast, men in this study coped adaptively with job loss by the way they stood in relationship to work: their jobs offered them meaning and a livelihood, but their jobs were not necessarily their exclusive domain for meaning-making in their lives. As labor's availability in an emerging gig economy shifts, the extent to which labor serves as a domain for meaning-making in adults' lives may shift as well. If humans are the only creatures for whom existence is a problem (Fromm, 1947), then job loss in a culture that regards employment as the answer to this existential problem takes on potentially dire dimensions. And yet in his *Tractatus Logico-Philosophicus*, Wittgenstein argued that "the solution to the problem of life is to be seen in the disappearance of the problem" (Monk, 1990, p. 142). Men in this study coped adaptively because of how they came to understand job loss: not as a problem per se, but a situation that challenged them to make meaning differently. These men, then, offered a philosophic response to job loss that illustrates what Lindeman (1926) insisted was the ultimate goal of adult learning: to grow and to become. To the extent that these men coped with a phenomenon that offered no easy or predictable path forward, their learning through uncertainty was made manifest on the educational margins.

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Part V

Applications and Implications of Researching Within the Educational Margins: Introduction

Deborah L. Mulligan

How do education researchers represent authentically marginalised groups in contemporary mainstream scholarship? The two chapters in this final section of this book address the wicked problem of best practice when research is applied to our most vulnerable citizens. The section begins with a thought-provoking conundrum that leaves readers with an alternative viewpoint when conducting research with educationally marginalised individuals. This is followed by a synthesis of ethical research methodology that the contributing scholars have applied when researching within the educational boundaries and when communicating and articulating the voices therein.

In Chap. 19, Deborah L. Mulligan poses a provocation in the form of asking researchers to examine their responsibilities to the respective marginalised groups with whom they have worked once the data gathering has been completed. She questions the appropriateness of complete disengagement after the research findings have been formalised, and she argues that researchers owe a greater responsibility to the participants beyond the completed project. The chapter delves into the axiology of activism and presents a compelling argument for reciprocity and for a willingness to engage with the issues underpinning the research long after the results have been published.

Finally in this section and in the book, Deborah L. Mulligan and Patrick Alan Danaher present a concluding chapter that details effective

strategies for best practice when researching within the educational margins. The chapter categorises the preceding chapters in the book around the key organising questions that the editors asked the authors to address when writing about their respective research projects. These five organising questions synthesise applications of and implications for both research theory and practice. We asked the contributing authors to examine not only what/with whom/why/how they researched, but also the past and potential future effects of their research on the participants. In this way, the editors have distilled the authors' significant contributions to understanding researching within the educational margins presented in the preceding chapters.

19

Activist Research: Real-World Reciprocity—A Provocation

Deborah L. Mulligan

Abstract This chapter invites the researcher to reflect on the question: "Where do I stand in relation to those I interview?" (Saeed, Between research and activism: The role of 'organic intellectuals' [Web log post]. Retrieved from https://blog.oup.com/2016/05/research-activism-organic-intellectuals-academia/, 2016). The answer is particularly relevant to those employing qualitative methodology and most especially to those investigating marginalised groups. The relationship between researcher and participant shapes an investigation and legitimises the production of knowledge. Philosophical assumptions related to subjectivity, value and truth enable the researcher to understand human decision-making and the consequential actions that arise from these decisions. Once cognisant of the constraints and the freedoms of these assumptions, the researcher is then able to enhance the rightful and appropriate agency of all stakeholders involved in the investigation.

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Introduction

It is my contention that academia no longer supports a linear process whereby data is collected, theorised, published and neglected by all but a chosen few. Contemporary real-world scholarship demands a manifestation of responsibilities not only to the funding provider but to the world at large, including the direct participants of the study. Before, during and after the study, researcher reflection on their positioning in this climate of social change is an essential element of an authentic and rigorous investigation.

This chapter invites the researcher to reflect on the question: "Where do I stand in relation to those I interview?" (Saeed, 2016). The answer is particularly relevant to those employing qualitative methodology, and most especially to those investigating marginalised groups. The relationship between researcher and participant shapes an investigation and legitimises the production of knowledge. Philosophical assumptions to do with subjectivity, value and truth enable the researcher to understand human decision-making and the consequential actions that arise from these decisions. Once cognisant of the constraints and the freedoms of these assumptions, the researcher is then able to provide rightful and appropriate agency for all stakeholders involved in the investigation.

Each of the contributors in this book has wondered at a particular phenomenon, or wicked problem, unfolding within their social/academic environment. They have chosen to articulate voices of previously silenced speakers. As such, these researchers have emerged as "organic intellectuals" (Saeed, 2016) who represent the specialised interests of these marginalised cohorts within their locational geography. In doing so, they provide representation and validity to those individuals and groups that mainstream society has deemed unworthy of sustained public attention. So often, in our increasingly small global neighbourhood, these voices, although seemingly isolated and excluded from the local public domain, have found a home in the greater international environment and economic structure through strategic investigative enquiry. Research into

these phenomena and publication of the findings therein have provided an avenue of social change, in essence the enactment of activism. At the basic level, researcher reflections and recommendations provide a meaningful pathway into the public conscience.

As ever, healthy research requires a balance between the interplay of the researcher and the researched. The performance of reciprocity is one that may be enacted through the giving and receiving of wisdom and truths between participant and researcher and vice versa. Too often, research becomes a one-way street wherein the scholar utilises knowledge gained from the participant with a lack of accountability in the provision of the reverse occurrence. Such relational inequality may damage the reputation of scholarship and completely misrepresent the positive opportunities afforded to all stakeholders.

The Axiology of Activism

Conventional notions of activism conjure up contentious images of police barricades, weaponry, protestor arrests and, at worst, the endangerment of lives. Such concepts exclude a major proportion of the population who have a desire to act for the 'greater good' but who are not interested in involving themselves in such extreme circumstances. Mallet (2017) suggested that the world needs a new, more inclusive definition of activism. She proposed that contemporary activism should include those of us who recognise the importance of their individual actions on the world at large and/or the localised area we inhabit. Recognition should be given to individuals who intentionally work towards the betterment of the world through a platform of their own choosing.

What constitutes activism in social research? Couture (2017), citing Hale, labelled activist research as having a three-pronged approach. Such research must enable the reader to grasp a better understanding of the problem and its causes; it must directly communicate and collaborate with the target group; and it must work alongside the target group to provide goals for the improvement of their situation (p. 143). Thus, the focus is on positive social change. This transformation is essential for the ongoing good health of society as a whole and its individual membership.

When referring to activist identity in an education environment such as a school, Groundwater-Smith and Sachs (2002) posited that: "First and foremost an activist professional is concerned to reduce or eliminate exploitation, inequality and oppression" (p. 352). This statement has more widely ranging implications for research professionals in any milieu.

When this idea is applied in a research setting, the scholar may attempt to balance the scales of social justice through the research process itself, culminating in the publication of findings and/or an ongoing relationship with the target individual/group. This process insinuates a moral responsibility on the part of the researcher to the participant. Such scholarship must be reflective, genuine and negotiated. "activist professional identities are rich and complex" (Groundwater-Smith & Sachs, 2002, p. 353). The undertaking of authentic and rigorous engagement with marginalised and vulnerable cohorts is laden with elements of trust and reciprocity.

Is the notion of reciprocity embedded in activist research? It is an academic truth that reciprocity involves a mutuality in the beneficial exchange of ideas. Ethical researchers build the foundation of trust when according full and comprehensive consideration to the giving and taking of information. "Essentially trust is a quality which demonstrates a confidence in the behaviour of another person, group or institution" (Groundwater-Smith & Sachs, 2002, p. 342). The concepts of expectation and reliance feature heavily in reciprocity and trust. The two authors posited that it is through the enactment of these generally underrated elements of human interaction, interpersonal relationships and organisational ethos are enhanced.

The notion of trust may be described as a type of social glue that bonds social connections. The twin relational concepts of trust and social glue have been explored by a number of scholars (Cranston, 2011; Govier, 1997; McClimans, 2013). Fransgaard (2011) defined social glue as "the ability to take all the individual parts and stick them together as one single vehicle taking the whole company forward at the same speed" (n. p.). The element of moving forward together as one entity can be transmogrified to one of the essential factors when building community connectiveness and establishing social capital. Effective and trustworthy research on marginalised groups within our communities raises awareness and has a beneficial impact on society as a whole. This is especially so when that research is publicised through networking channels.

Anderson and Jack (2010) defined social capital as the glue which binds the networking process and also the oil that smooths facilitation of the networking experience. Even though these authors focussed on entrepreneurial networks, there are parallels which can be drawn between their hypothesis and that of social capital as a manifestation of the dimensions of trust and reciprocity in qualitative research. Specifically, Anderson and Jack (2010) asserted that: "social capital is not a thing, but a process that creates a condition of social capital" (p. 193). The same "process" can be applied to the researchers' quests for authentic relationships with their participants. Rich and genuine findings rely on the engagement of trust between stakeholders created during the course of the research. The resultant manifestation of the findings in the form of a published document creates an avenue for social capital in that it brings public attention to a social inequity. Activism at its most basic constitutes a public awareness of a previously unexplored or misrepresented concept such as marginalisation.

In his investigation into the efficacy of development schemes in third world countries, Scott (1999) referenced a "geography of trust" (p. 273). Simply put, this term referred to the understandings (or lack thereof) of reciprocity mirrored in the exchanges between multinational corporations and the local cultural traditions in which they attempted to operate. Scott examined two features—(1) the merit of the rationale behind the actions of the corporations and (2) the 'otherness' created by two disparate groups operating side by side. In this way he highlighted the two elements of purpose and trust as essential ingredients in a social "glue" (p. 275). This glue characterised a reciprocal interchange that formed the bond for positive action between the two groups. He further stated: "How we judge the activities that this social glue makes possible is another matter" (p. 278). This notion of the navigation of a "geography of trust" (p. 273) may be considered as one of the essential traits of a successful research project.

Qualitative researchers are morally required to ask themselves particularised questions about their topic that relate to existence (ontology), ethics (axiology) and truth (epistemology). Whilst undeniably, each of these elements are of strategic and equal importance to the rigorous enactment of research, at this stage, it is timely to discuss the concept of ethics as it

relates to academic activism. Somekh and Lewin (2011) defined axiology as referring to "philosophical questions relating to the nature of values" (p. 320).

Values are a slippery slope in terms of a qualitative researcher's identity and assumptions. They are inherently peculiar to the individual and may change at any given moment during the research process when exposed to previously unknown information. Values are also the moral standard to which we hold ourselves accountable. How much ethical weight we apply to certain issues becomes a researcher-centric issue in terms of the paradigmatic schema employed; the context of the investigation; and the personal and academic nature of the research.

Activist identities may be personified by elements based on transparency of ideas; a willingness to constructively engage with the unknown; positive interactive expectations; effective evaluative and reflective practices; a sense of care and responsibility for others; and a readiness to appreciate 'otherness'.

During an enquiry, decisions must be made around the degree to which individual and societal values should be placed on certain topics or aspects. Based on the paradigm utilised, the researcher must pose questions such as:

What are the facts as I know them?
How much does society value my target cohort?
How much does my target cohort value themselves?
How do I position myself as a researcher vis a vis my moral compass?
What are my unconscious biases and assumptions, and how do I allow for them as I conduct my research?

Having negotiated this ethical maze, the researcher is then tasked with documenting the application of findings by way of publication in a chosen format. But is there a life for this topic after that? What responsibilities does the researcher owe to the stakeholders, primarily the participants, who have invested their own axiological ideals into the research?

I would argue that after the investigation is completed, it behoves the researcher to ask him/herself—"How strongly do I feel about my findings?" Inherent values are significant, particularly in the area of social

injustice. Having asserted the strength of the impact of the research findings the following question may be posed: "Am I driven to partake in any direct or indirect social action or activism as a result?"

What Is Activism in the Twenty-First Century?

Ernest Boyer's (1996) seminal paper entitled "The Scholarship of Engagement" is presented as a useful focal point around which to build a conceptual framework for activism. Boyer's paper focused on higher education and the relationship between teachers and students, and colleges/universities and schools. He argued that: "the academy must become a more rigorous partner in the search for answers to our most pressing social, civic, economic, and moral problems, and must reaffirm its historic commitment to what I call the scholarship of engagement" (p. 13).

Boyer (1996) called for a "new paradigm of scholarship" (p. 16) and argued for more open communication between student and teacher that would, in turn, significantly enhance the wellbeing of society. He advocated the mutual intentional exchange of speaking and listening as a method of providing agency between all actors. This is an intriguing idea and can be extrapolated to include reciprocity between participant(s) and researcher(s). In his theory Boyer (1996) hypothesised four elemental factors that mesh together to produce a Scholarship of Engagement (p. 16). These are represented diagrammatically in Fig. 19.1 below.

Discovery, according to Boyer (1996), involves the research conducted at universities and their mission to expand the boundaries of current knowledge as experienced by academics and the world at large. The element of integration utilises current knowledge and involves an interwoven model of multidisciplinary practices. He further called upon higher education to create a paradigm of new knowledge that is relevant to both contemporary and future societies. Finally, he urged scholars to share their knowledge with others for the greater good of the community (p. 16). Boyer (1996) argued that it is only through the utilisation of these four functions that knowledge becomes pertinent and purposeful. "I have this growing conviction that what's also needed is not just more programs, but a larger purpose, a larger sense of mission, a larger clarity
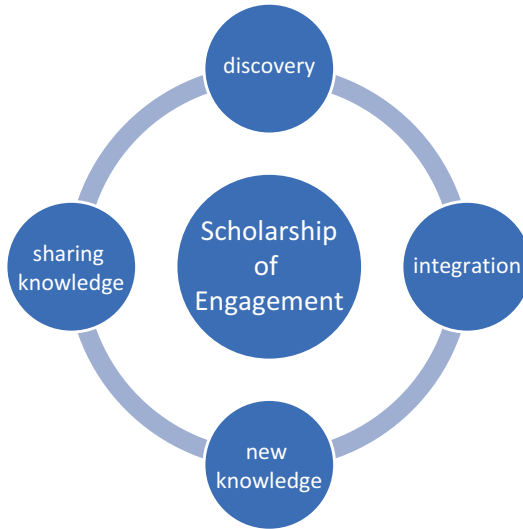
Fig. 19.1 A diagrammatic representation of Boyer's (1996) "Scholarship of engagement"

of direction in the nation's life as we move forward" (p. 20). A visionary sentiment.

With the ongoing notion of 'moving forward' in mind, I would add a twenty-first century, fifth element to the functionality of Boyer's "Scholarship of Engagement" framework—that of activism. It is no longer morally and ethically sustainable to practice the sharing of original contributions to knowledge with a chosen few. I would argue that Boyer sensed an impending smaller global neighbourhood that encompassed not only scholarship within one nation but that impacted the international scene as a whole. I propose that his egalitarian attitude to scholarship could embrace the element of activism. Figure 19.2 reconfigures Boyer's (1996) original Scholarship of Engagement.
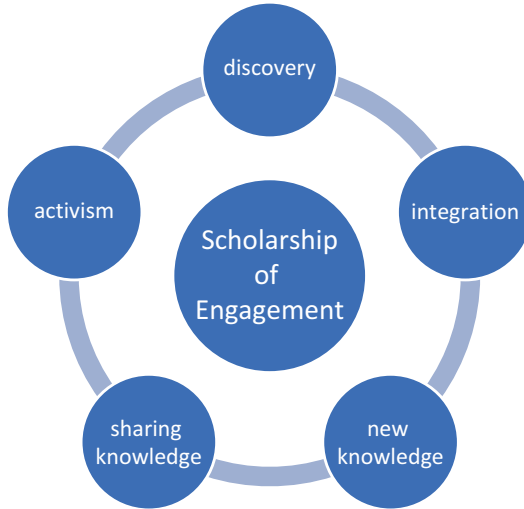
Fig. 19.2 Boyer's (1996) "Scholarship of engagement" reconfigured

Discussion

- Who owns knowledge? The researcher? The funding body? The participants? The audience? Does anyone actually own knowledge?
- Is knowledge merely the culmination of a scientific (quantitative/qualitative/mixed method) investigation? Or is it, in fact, the investigation itself?
- Does the formation of knowledge rest in the hands of the researcher? The participant?
- Having uncovered knowledge, how much agency does the acquisition and the receiving of knowledge allow?
- Having examined the axiology of activism and the inherent values therein, what of the roles of epistemology and ontology?

The answers lie somewhere in the philosophical positionalities of the researcher, the funding body and the participants.

The intricacy of conducting reciprocal research that benefits both participant and scholar is complex and many faceted. Layered over these

*Passive
Activism*

*Extreme
Activism*
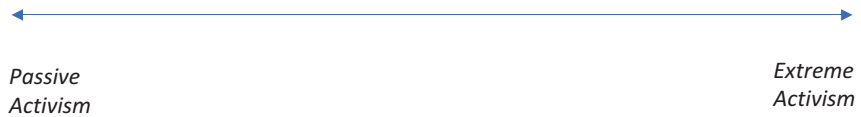
Fig. 19.3 A continuum of activism

complexities is the issue of trust and respect. The researcher is tasked with the ideological convolutions of acting upon the findings of the study. Is it enough to merely reproduce results in the form of a document, or series of documents? What are the researcher's responsibilities in terms of acting upon these findings in a more proactive manner? Enlisting activism as a reciprocal arrangement can benefit both researcher and researched.

Activism can be fluid in nature and can be constructed in a spectrum of behaviours. The different levels of activism can be imagined on a continuum with passive activism at one end and extreme activism at the other. This is diagrammatically represented below in Fig. 19.3.

Within a research community, passive activism may constitute the one-off publication of an article in a journal/newspaper/book/website, or the delivery of a one-off oral presentation in the local community centre. Extreme activism may occur when the researcher, having investigated a social phenomenon, may decide to take a more visceral/active approach to alerting a wider public audience to their findings. An example of this may be the researchers putting themselves in harm's way and risking their life to save an animal species or rescue abused children. Thereby making a more proactive and wide-ranging statement about the results of their investigation with the hope of drawing a larger, more global audience.

The essence of conducting authentic social research is the researcher's interrogation of the meaning of the investigation. What is their ethical response to the findings? Danaher and Danaher (2008) described the notion of ethics as: "fluid and transitory [in] character, as well as the intersection with myriad other forces of power and meaning making" (p. 61). They referred to the "transitoriness and unpredictability" (p. 62) of framing values within a research project. The authors (2008) posed the question: "Which assumptions, attitudes and values on the part of the researchers have been or are likely to be revealed by the design and conduct of their research projects?" (p. 67). This is a valid question when

conducting social research. The values of the researcher are all important in determining authenticity and rigour.

What about when the research is complete? Is it enough for the researcher to take an objective stance and present (or not) the investigative findings to the funding body and then wash their hands of the topic altogether? Under certain circumstances this is a most valid form of action—particularly if that is all that is financially required of the researcher.

What are their ethical responsibilities to the participants that they enlist to help them in their study? "How can and should educational researchers position themselves in relation to the research projects?" (Danaher & Danaher, 2008, p. 67). This may be extrapolated as a consideration upon completion of the enquiry. I would argue that the positioning of ethics/values is as important post-research as it is during the actual research process.

"What are the implications of recognising researcher identities for contemporary debates about the significance and utility of educational research?" (Danaher & Danaher, 2008, p. 67). This is the 'before' and 'after' subjective question. Is a research project still significant after publication and with no further action taken by the enquirer on behalf of the participants? The answer is complex and nuanced. Is there an obligation on behalf of the researcher to act beyond the final product on the printed page? What benefit does research have to the wider community if it is hoarded by specific actors or the learned elite?

Maxey (2005) explored the notion of activism in its capacity to liberate the researcher and provide an avenue for personal growth. "The social world is produced through the acts each of us engages in every day … activism [is] the process of reflecting and acting upon [these actions] … it gives rise to a continual process of reflection, challenge and empowerment" (p. 201). He supported the ideal of activism as a boundaryless construct and one that included every person. Maxey (2005) suggested the configuration of a new discourse around activism that challenges assumptions of social exclusion. "activism is not a fixed term, but it is actively constructed in a range of ways" (p. 199). He enlisted the strategic element of personal empowerment as an inspiration for activism. A reflexive researcher may choose to view their findings as a "performative"

(p. 202) contribution to knowledge. Such a contribution to agency on behalf of the researcher and the researched may find a place at any point along the continuum of activism.

Flood, Martin, and Dreher (2013) stressed the notion of "ideological commitment to social and personal change" (p. 17) when contributing to scholarship. They interpreted a four-pronged approach to academic activism which included the responsibilities of the researchers as well as the academic establishments. They concluded that research should inform and add to the quality of knowledge for the advancement of social transformation and that the performance of the process of the investigation itself should be enacted in such a way that is beneficial to social change. Academic institutions should not only lead the way as a bastion and caretaker of progressive strategies that enlighten social change, but they themselves should be challenged to reinvent best practice.

The nature of the compelling personal and professional benefits of research activism has also been posited. "Activist academics can find meaning and comfort in the sense that their work contributes to the greater good, nourishing a sense of personal and collective purpose" (Flood et al., 2013, p. 18). The sense of researcher growth and purpose is an important one that points to identity and authenticity in research. The researcher who is personally invested in the outcome of the study as a means of social benefit is more committed to the genuine process of developing rich and meaningful data. Nourishing the collective psyche makes for healthier communities and more individual commitment to social growth and combatting marginalisation within society.

Qualitative research, and the effects it has on the researcher, is a subjective phenomenon. Klein (2000) discussed conversations overheard between various hierarchies of a nursing fraternity at a particular hospital. He hypothesised a "We They Dynamic" (p. 3) that involved a conflict arising from lack of understanding about a particular situation between existing factions within the hospital. This then led to a misrepresentation of reality on behalf of both groups. He asserted that each group brought their own subjectivity based on personal and collective axiological foundations to the circumstance around the conflict. This co-creation of reality within groups led to the formation of opposing ethical viewpoints,

that is, the "We" against "They" mentality. Klein (2000) claimed that collective identity formed when like-minded individuals with similar cultural histories align and form groups. These individuals bring to their chosen social group embedded social assumptions around values, morals and ethics. "This pervasive 'We They Dynamic' affects virtually all our relationships, especially those involving differences in social status, roles, and positions" (p. 3).

Klein's "We They Dynamic" (p. 3) could be transmuted to the world of scholarship engagement and activism. I contend it could be rebranded as an 'Us Them Paradigm' whereby researchers distance themselves from the topic they study in order to maintain objectivity or for other personal/professional reasons. This could have dangerous ramifications for the impact of their research as far as application to the notions of social capital and social cohesion, or social glue. Klein utilised social glue discourse when referencing aspects such as rights and responsibilities of local communities to the individuals within them. He utilised terms to do with mutuality such as "recognition" of others; "connectedness" to others; "responsibility" and "concern" for others (p. 5).

Traditionally, universities and similar institutions of higher learning have been considered as the rightful custodians of academic research. This narrow perspective assumes a certain elitism and a hoarding of knowledge that is unavailable to those outside or removed from the field of scholarship. Atkinson (2013) contested the notion of academic gate-keepers and posited that such conventions have no place in the reality of today's academic world.

Scholarship should be available to all members of a society should they wish to access it. This is the only way in which it can evolve into a creature of contemporary merit. Qualitative studies should allow for locational relevance and real-world significance. If the opposite situation occurs, knowledge growth is stunted and remains archived and unrecognisable. Research should add new, contemporary dimensions of understandings to significant perceptions that fill in the societal gaps and silences. It should also be reciprocal in nature, thereby allowing the participants to feel that they play a necessary and active role in the formation of findings that shape the study.

Academic activism is an important aspect of collective learning and collective wisdom. It is generally agreed that the conservation, dissemination and generational succession of information is vital. Social justice activism can be manifested in multiple arenas from a passive offering of a thesis and the resultant journal articles to investing in more interactive action to alter the status quo. However, it is my contention that we need to move beyond the mere act of harvesting knowledge for the sake of it. As academics, and most particularly qualitative researchers, we stand at the coalface of truth (however many multiple forms it may take) and data impact. We interview our participants and gather material about their lives. Are we then duty bound to monitor the effect of this information on humanity? This would include both the marginalised fringe dweller cohort that we set out to examine and the society as a holistic entity. Therefore, our efforts guide the marginalised from learning on the educational and societal edge to full mainstream acceptance by not only the community in which they live as well as the wider national and international community, but the marginalised individuals themselves.

Conclusion

Are research participants more than just a means to publication? Where is the moral obligation of the researcher and the higher education institutions positioned in terms of contribution to this social glue? Should a researcher, after having uncovered an unacceptable societal fault such as marginalisation or prejudice, be duty bound to do more than simply publish findings? Are they ethically obliged to involve themselves in the implementation of more direct activist behaviours?

In summary, it is my belief that researching within educational margins demands authenticity and rigor in order to effectively communicate and articulate these marginalised voices. Researchers are tasked with the following moral conundrums—Who am I? What do I believe in? How can I ensure the validity of representation of my research participants? It behoves responsible researchers to reflect on these three key questions throughout their research journey from conception to publication and beyond.

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Researching Within the Educational Margins: Selected Answers to the Organising Questions

Deborah L. Mulligan and Patrick Alan Danaher

Abstract This final chapter in the book affords the opportunity to review the preceding chapters against the backdrop of the book's objectives and foci. This process is facilitated by the selection of three themes that emerged as running across those chapters: the importance of individualised learning, not only for the participating individuals but also for the holistic wellness of society as a whole; the continuing constraints of educational marginalisation and the deleterious effects that these constraints have on the education system itself; and the importance of the contexts of learning not being limited by formalised, tightly controlled philosophies of what it is to be an effective learner. These themes are then aligned with distilled responses to the book's five organising questions.

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Keywords Educational margin/s • Educational marginalisation • Individualised learning • Research strategy/ies • Voice/s

Introduction

This chapter concludes this book about researching within the educational margins, and about effective and sustainable strategies for communicating and articulating the diverse voices that strive to be heard within those margins. The chapter does this by presenting selected responses to the book's five organising questions that were posed in Chap. 1:

1. How can education researchers help to analyse and explain ***why and how*** some individuals and groups come to be learning within the educational margins, and what the ***effects*** of learning within the educational margins for those individuals and groups are?
2. How can education researchers develop and apply ***effective strategies for researching*** with individuals and groups who are learning within the educational margins?
3. How can education researchers maximise the ***innovativeness, reciprocity and utility of their research methods*** for the marginalised participants in their research?
4. How can education researchers contribute to ***educational fringe dwellers communicating their experiences and articulating their voices***?
5. How can education researchers assist the marginalised participants in their research to ***become successful educational border crossers***?

In re-engaging with these organising questions, it is timely also to recall the book's division into five parts:

• Part I: Contextualising and conceptualising researching within the educational margins.

- Part II: Researching with children and marginalised youth.
- Part III: Researching about cultural differences and intercultural experiences.
- Part IV: Researching about informal learning and with older learners.
- Part V: Applications and implications of researching within the educational margins.

Against that backdrop, the chapter is organised around the following two sections:

- An initial distillation of selected themes arising from the preceding chapters' content.
- A targeted alignment of these themes to address the book's five organising questions.

Selected Themes Arising from the Preceding Chapters' Content

From the numerous potential collections of ideas that presented themselves from the preceding chapters, we have selected three themes that we have distilled from those chapters that we consider reasonably representative of the widely ranging and richly illustrated propositions traversed in those chapters pertaining to researching within the educational margins:

- The importance of individualised learning, not only for the participating individuals but also for the holistic wellness of society as a whole.
- The continuing constraints of educational marginalisation and the deleterious effects that these constraints have on the education system itself.
- The importance of the contexts of learning not being limited by formalised, tightly controlled philosophies of what it is to be an effective learner.

The Importance of Individualised Learning for the Holistic Wellness of Society

In Chap. 3, Michelle Jayman argued persuasively that programme evaluation and development in the United Kingdom should include systematic strategies for harnessing the "unique voice" of the child in order to generate authentic and comprehensive understandings of the effects and the effectiveness of educational interventions designed to enhance children's educational outcomes. More broadly, this chapter demonstrated the interdependent relationship between the individual experiences of the "targets" of educational interventions and the overall success of such interventions. Or to express this crucial proposition a little differently, programmes intended to increase learning outcomes can have deleterious unintended consequences that become apparent only by systematically mapping the participants' experiences. If those experiences are negative, the holistic wellness of society cannot be progressed.

In Chap. 4, Corey Bloomfield and Bobby Harreveld pursued a similar proposition, but from the perspective of an alternative learning programme in Central Queensland, Australia. Methodologically, the authors elaborated ethical issues pertaining to informed consent and insider status related to researching with the marginalised youth who participated in that programme. The "institutional othering" that their analysis revealed as prompting the need for such a programme had created a fundamental disjuncture between the young people's individualised learning on the one hand and the holistic wellness of the community to which they belonged on the other hand. From this perspective, alternative learning programmes can function to bring these two phenomena into closer alignment.

In Chap. 11, Mike Danaher explored the potential connection between individualised learning and the holistic wellness of society as encapsulated in a study tour to China in November 2018 by a group of Australian undergraduate students. Deploying the notion of critical interculturality to inform his research within this particular educational margin between

the two societies, the author identified instances of transformed awareness by individual study tour participants that illustrated their attentiveness to a broader concern for intercultural understandings based on mutual rapport and shared respect. At the same time, some students' utterances demonstrated the difficulty of shifting sometimes entrenched beliefs in a relatively short time frame. Nevertheless, the chapter reinforced the need for nuanced and sophisticated critical thinking as a vital element of effective cultural exchanges.

In Chap. 17, Deborah L. Mulligan interrogated the tragic phenomenon of older men's suicide rates as a stark reminder of the absence of meaningful individualised learning for those men, and hence of a serious equivalent absence of the holistic wellness of the communities to which they belonged. The chapter investigated specific, all-male programmes—the Men's Sheds movement and The Older Men's Network (TOMNET)—as carefully targeted responses to these two parallel absences in South East and South West Queensland, Australia. The author also explored researcher reciprocity and situated ethics as important conceptual considerations when researching within these particular educational margins. This chapter highlighted poignantly and powerfully the potentially life changing and transforming dimension of the indivisible link between individualised learning and the holistic wellness of society.

In Chap. 18, Brian S. Hentz elaborated that same link from the different perspective of involuntary job loss for older, professional men in the United States. Drawing on phenomenological analysis, the author identified considerable divergence in the responses of individual men to this often traumatic situation. The individuals who demonstrated the highest degree of adaptive resilience in this study exhibited more developmentally complex ways of meaning-making, positioning themselves as "narratives" with subsequent chapters to be written in their lives. More widely, this kind of contained courage and individualised resilience against the backdrop of systemic marginalisation was a recurring premise that was enacted in varied ways in several chapters in the book.

The Deleterious Effects of the Constraints of Educational Marginalisation on the Education System

In Chap. 6, Jennifer Clutterbuck articulated how a particular education system was complicit, even if inadvertently and unintentionally, with the distinctive constraints of educational marginalisation, and in doing so contributed directly to the seriously deleterious effects of such marginalisation. The chapter demonstrated how OneSchool—an online student management system used in government schools in Queensland, Australia—viewed, governed and even "created" specific categories of marginalised learners. The author illustrated this disturbing argument by reference to Aboriginal and Torres Strait Islander students' Indigenous languages, as well as to a student's acceptance of a "datafied" version of himself as his real identity. This situation also meant that the education system itself was less authentic, empowering and productive than it might otherwise be.

In Chap. 7, Christian Quvang presented segments of the narrative of Nanna, a young Danish woman with special educational needs. The narrative was conducted several years after the occurrence of the schooling experiences that Nanna recalled in the narrative. Despite glimpses of family members and teachers who sought to encourage and support Nanna, the narrative demonstrated that the education system largely failed to do so, and by contrast contributed to her continuing sense of educational marginalisation. The author linked this systemic failure for Nanna with the additional insights afforded by theorising educational exclusion and inclusion in terms of different kinds of relationships.

In Chap. 9, Bronwyn Wong drew on action research to co-construct with a group of her fellow teachers in an Independent Christian school in New South Wales, Australia her and their strategies for resisting the educational marginalisation of individual teachers by the market-driven schooling system in which they worked. These strategies were animated by the participants' shared Christian faith, synthesised by the author's Tripod of Shalom that constituted a crucial counterpoint to the competitive individualism of the schooling system that marginalised their

students and them. The deleterious effects of this marginalisation notwithstanding, the action research project elicited more transformative understandings of teaching and learning that empowered the participants to work towards new educational practices. More widely, this interplay among marginalisation, resistance and in certain cases transformation was evidenced also in some other chapters in the book.

In Chap. 12, Samantha Burns and Patrick Alan Danaher investigated the inextricable links between individual learners and a national education system that in turn highlighted the contextual specificity and the cultural distinctiveness of those links. The chapter presented elements of the first-named author's doctoral study about the educational experiences of a group of Dhofari women who were studying English language undergraduate courses in Oman. Informed by critical interculturality, the analysis identified the highly varied ways in which individual participants and their families interpreted and derived meaning from the widescale national changes enacted by the late Sultan Qaboos. In this situation, the character of the educational marginalisation experienced by the participants was more ambiguous and ambivalent than was the case with other chapters in the book.

In Chap. 13, Geoff Danaher and Patrick Alan Danaher interrogated the enduringly deleterious effects of education systems on members of the occupationally mobile fairground or show communities in Australia and Great Britain. The authors contended that these communities engaged in educational border crossing, moving across jurisdictions and systems, in ways that rendered them as invisible or as deviant from the perspectives of those jurisdictions and systems. At the same time, the chapter mobilised an updated version of the concept of border crossings to illustrate the countervailing argument that, by virtue of this same educational border crossing, individual students and their families, and also teachers and administrative leaders, were able to generate material improvements to educational provision for these occupationally mobile learners. Likewise, as educational border crossers themselves, the authors and their fellow researchers engaged carefully with issues of rapport, reciprocity and representation to make their research within this particular educational margin as authentic and mutually beneficial as possible.

In Chap. 15, Marlyn McInnerney illustrated the material constraints of alienating education systems and their deleterious effects on individual learners and their families in her account of women schooling their children on their generally very large farms or properties in remote Queensland, Australia. As a member of this community with her own property, the author reflected on her application of insider research to understand the convergent and divergent approaches to schooling their children implemented by her fellow mothers and property owners. On the one hand, the participants discussed particular innovations that facilitated these schooling approaches. On the other hand, these innovations were developed against the backdrop of a largely unheeding education system that in turn was less effective than it might otherwise have been owing to this devaluing of certain kinds of diversity of approach and experience among the recipients of that system.

Learning Contexts Not Being Limited by Formalised, Highly Controlled Philosophies of Effective Learners

In Chap. 5, Naomi Ryan explored a specific flexible learning programme for marginalised youth in South West Queensland, Australia. What emerged clearly from the author's analysis of that programme were the opportunities for educational innovativeness afforded by empowering school-level and pedagogical leadership that refused to be constrained by a tightly controlled philosophy of who and what effective learners and learning are. Acting in concert with this more inclusive and empowering approach, the author enacted particular ethnographic research strategies to exhibit insight and sensitivity when engaging with the programme's multiple stakeholders. Flexibility and attentiveness to individual needs and local contexts emerged as powerful findings for learners, educators and researcher alike.

In Chap. 8, Karen Glasby demonstrated equivalent flexibility and innovativeness in her design and implementation of her qualitative case study of autistic individuals transitioning to post-secondary school opportunities in South West Queensland, Australia. The chapter examined the effectiveness of this approach in terms of the participants' agency,

capacity and voice. As with the researcher's strategies, so too with the education system needing to be open to more nuanced and situated understandings of young autistic individuals if the latters' educational experiences were to be meaningful personally and to facilitate sustainable post-school earning and learning possibilities. From this perspective, a single, "one size fits all" policy would elide crucial individual differences and contribute to the students' already existing educational marginalisation.

In Chap. 10, Megan Forbes generated corresponding findings from her study of the complex interplay between acts of memorialisation and individual and collective social and emotional wellbeing on the part of Aboriginal communities in rural and remote areas of South West Queensland, Australia. Similarly, the author applied the interpersonally authentic and situationally specific process of yarning, developed by the communities themselves, as a means of researching ethically and reciprocally in this particular educational margin. The chapter demonstrated how privileging participants' voices, against the backdrop of their prior and continuing marginalisation, can contribute to challenging that marginalisation. This demonstration had wider implications about the common humanity of research participants and researcher that resonate also with other chapters in this book.

In Chap. 14, Linda Clair Warner, Pirita Seitamaa-Hakkarainen and Kai Hakkarainen explored the innovative research strategies that they used to investigate the informal learning attending collective quiltmaking in Aotearoa New Zealand. Linking the quiltmakers' marginalisation with inaccurate stereotypes about quiltmaking as a rule-bound activity that restricts creativity, the authors established that, by contrast, the quiltmakers engaged in highly creative and innovative approaches to their craft that constituted the authors' "Apprenticeship Model of Craft Community Learning". Likewise, the chapter discussed the authors' creative and innovative approach to researching ethnographically with this informal learning community. In both cases, the quiltmakers/researchers became border crossers and generated new knowledge of a previously poorly understood phenomenon.

In Chap. 16, Brian Findsen presented a selected distillation of research strategies and findings related to his decades of work as a scholar

concerned with learning in later life. The chapter included examples of particular research projects conducted by the author in Aotearoa New Zealand and in Glasgow, Scotland. The author advocated a research approach predicated on participatory strategies and directed at honouring the integrity of older adult learners. Again centralised, homogenised, system-level constructions of "normal" learners and learning were displaced by more contextualised, heterogeneous and participant-led understandings of such learners and learning.

Aligned Themes to Address the Book's Organising Questions

In this section of the chapter, we build on the three themes elicited in the previous section and align them with the book's five organising questions. This textual strategy is designed to synthesise responses to those questions that engage with some of the diversity and sophistication of the analyses in the book's preceding chapters, while also inviting readers to re-engage with those chapters, and thereby to encounter even more of that diversity and sophistication.

How Can Education Researchers Help to Analyse and Explain *Why and How* Some Individuals and Groups Come to Be Learning Within the Educational Margins, and What the *Effects* of Learning Within the Educational Margins for Those Individuals and Groups Are?

If we extrapolate from our discussion in Chap. 2, where we articulated wicked problems as one possible way to conceptualise educational marginalisation, such marginalisation emerges as multi-causal and multifaceted, and also resists single, simplified solution. From this perspective, the reasons why, and the processes by which, particular individuals and groups come to be learning within the educational margins are as diverse as the contexts in which those individuals and groups strive to learn. At

the same time, rigorous research strategies can identify specific causes, and can trace the genealogy of those causes over place and time. Similarly, the multitudinous effects of educational marginalisation on those individuals and groups can be mapped and evaluated within the governance and power networks that frame and constrain their learning.

For instance, in Chap. 6, Jennifer Clutterbuck analysed the causes of particular groups' educational marginalisation in terms of massive, system-wide data infrastructures operating in government schools in Queensland, Australia. Likewise, the effects of those infrastructures on the learning outcomes of those groups were highly deleterious, perpetuating existing inequities and prompting some individuals to assume their assigned and negative identities as their own. Similarly, Bronwyn Wong used Chap. 9 to link a market-driven schooling system in New South Wales, Australia, with negative educational outcomes for her fellow action researchers and herself and also for their students. The effects of learning within these educational margins were demoralising and destructive for teachers and students alike. Moreover, in Chap. 15, Marlyn McInnerney analysed the educational marginalisation of women living in remote areas of Queensland, Australia in terms of the women's physical and sociocultural distance from the centre of educational decision-making in metropolitan Brisbane.

How Can Education Researchers Develop and Apply *Effective Strategies for Researching* With Individuals and Groups Who Are Learning Within the Educational Margins?

It is clearly crucial for researchers to avoid inadvertently contributing to the continuing disenfranchisement of individuals and groups who are learning within the educational margins. This could be done, for example, by unintentionally misrepresenting the diversity of experiences among those individuals and within those groups, prompting ill-advised, superficial policy prescriptions that might benefit some learners but further marginalise others. Accordingly, researchers must ensure that their research strategies are effective in engaging comprehensively and directly

with the distinctive contexts in which individuals and groups experience educational marginalisation, and in generating new and informed understandings that challenge existing prejudices and stereotypes.

For instance, in Chap. 3, Michelle Jayman demonstrated how carefully targeted educational intervention programme evaluations in the United Kingdom can be successful if they include equally carefully developed techniques for recording, respecting and understanding the "unique voice" of the child who is positioned as the recipient and the hoped-for beneficiary of such evaluations. Similarly, Naomi Ryan exemplified in Chap. 5 how her distinctive application of ethnographic research, exhibiting researcher insight and sensitivity, contributed to her comprehensive mapping of the diverse and sometimes contradictory experiences and worldviews of different participants and stakeholders in a flexible learning programme in South West Queensland, Australia. Furthermore, in Chap. 16, Brian Findsen used his account of the philosophical, pragmatic and ethics issues encountered by later life learning researchers, grounded in his own research in Aotearoa New Zealand and in Glasgow, Scotland, to explain how such research can be participatory and even emancipatory.

How Can Education Researchers Maximise the *Innovativeness, Reciprocity and Utility of Their Research Methods* for the Marginalised Participants in Their Research?

We assume and expect that researchers seek to act ethically and professionally, and that they employ research methods that are appropriate for the concerns and contexts of the participants with whom they research. Yet researching effectively and ethically within the educational margins sometimes requires new and innovative approaches to existing strategies, and/or entirely new strategies that align more closely with the material realities of particular marginalised communities. For example, in Chap. 19, the first-named author related her provocation about researchers be(com)ing activists to her determination that reciprocity should be "real world" in character, and should be situated in the aspirations and needs

of the research participants rather than deriving primarily from the researcher's desires.

Moreover, in Chap. 4, Corey Bloomfield and Bobby Harreveld interrogated such ethical issues as informed consent and insider status when navigating the affordances and challenges of insider and outsider research with participants in an alternative learning programme in Central Queensland, Australia. Likewise, Samantha Burns and Patrick Alan Danaher used Chap. 12 to investigate Dhofari women's experiences of studying English language undergraduate courses in Oman, with Samantha combining the roles of researcher and the students' former teacher, and using her finely honed intercultural competence to develop rapport and trust with the participants. Additionally, in Chap. 14, Linda Claire Warner, Pirita Seitamaa-Hakkarainen and Kai Hakkarainen demonstrated heightened innovativeness and utility in their employment of ethnography to work closely with the two quiltmaking communities in Aotearoa New Zealand with whom they developed contextually appropriate reciprocity.

How Can Education Researchers Contribute to *Educational Fringe Dwellers Communicating Their Experiences and Articulating Their Voices*?

A key element of this book's focus, represented in the book's subtitle, has been directed at communicating and articulating the diverse and multiple voices that can and should be heard when researching within the educational margins. Yet this seemingly straightforward goal is sometimes fraught with challenging questions. For example, whose voices should be communicated and articulated? What should researchers do if those voices are contradictory and discordant rather than being expressed consistently and in harmony? How do researchers avoid having their judgements swayed by individuals and groups with strong voices arising from their dominant speaking positions? By contrast, how can researchers seek to meet individuals and groups whose voices are typically unheard, and which strategies can they use to generate rapport and trust with those whose voices they consider should be heard more often and should be

spoken more loudly? Researchers need to dig deeply into their methodological toolkits to be able to address these kinds of thought-provoking queries.

For instance, in Chap. 7, Christian Quvang demonstrated the effectiveness of the facilitated retrospective narrative that he conducted with Nanna about her experiences as a young woman with special educational needs in Denmark as one successful approach to assisting educational fringe dwellers to communicate their experiences and to articulate their voices. Similarly, Karen Glasby explained in Chap. 8 how carefully tailored research strategies directed at optimising strengths and at minimising potential risks for participants were implemented in her study of the post-secondary school opportunities of autistic individuals in South West Queensland, Australia. In Chap. 11, Mike Danaher applied the notion of critical interculturality as an analytical lens to interpret the heterogeneous assumptions and attitudes of a group of Australian university students about their study tour to China, thereby highlighting the research rigour that can derive from a sophisticated concept's application to thematic analysis in order to amplify participants' voices. Moreover, Geoff Danaher and Patrick Alan Danaher used Chap. 13 to exemplify how, understood as agential border crossers, education researchers can work collaboratively with Australian and British fairground or show communities to elicit participants' voices by means of such approaches as intercultural communication, nuanced vocality and co-authorship of research presentations and publications.

How Can Education Researchers Assist the Marginalised Participants in Their Research to *Become Successful Educational Border Crossers*?

Perhaps the most challenging, yet also the most potentially productive, element of research ethics is centred on moving from the somewhat passive and reactive injunction to "Do no harm in one's research" to the more positive imperative to "Do good with one's research", focused on the notion of research beneficence. Yet this imperative is attended by all manner of snares and traps for the unwary. For example, as we noted

above, what might count as "good" for some individuals and groups in a marginalised community might have more negative outcomes for other individuals and groups. From a different perspective, allying oneself with certain individuals and groups in that community might—intentionally or unintentionally—challenge the formal and/or informal power grids that operate currently in the community. Nevertheless, we contend that researchers should be attentive to opportunities for working with marginalised participants in order to assist them to become successful educational border crossers.

For instance, in Chap. 10, Megan Forbes exemplified how her employment of the Indigenous practice of yarning was indispensable in her being able to enact research strategies based on active listening, respectful silence, attentiveness to what was not being said as much as to what was being said and awareness of voices being heard in the environments that for the participants constituted the community's lifeblood—all crucial elements of her goal of privileging the voices of Aboriginal communities in South West Queensland, Australia. Likewise, Deborah L. Mulligan explained in Chap. 17 how her research with older men in South East and South West Queensland, Australia included her explorations with them of the notion of contributive needs, which constituted a powerful and empowering counternarrative to contribute to their status as educational border crossers moving away from suicide ideation. Furthermore, in Chap. 18, Brian S. Hentz's phenomenological research with older men who had lost their jobs in the United States incorporated his facilitation of participants' narratives that included more enabling and potentially transformative accounts of their possible future lives.

Conclusion

From the distilled discussion outlined in this chapter, and from the much more comprehensive accounts presented in the preceding chapters, it is clear that the applications and implications of researching within the educational margins that were canvassed in this final part of this book, and that have been elaborated in different ways in Chap. 19 and in this present chapter, are complex, contextualised, politicised, animated by

aspirations of beneficence and empowerment, yet situated within historically constructed networks of power and regimes of truth. Relatedly, the continuing project of devising effective and ethical strategies for communicating and articulating the multiple voices associated with educational marginalisation is equally challenging and crucial.

As editors of and contributing authors to this book, we contend that, in diverse yet equally provocative and successful ways, the chapters in the book draw on high quality research, characterised by methodological rigour and theoretical sophistication, that can yield principled and practical insights that can support researchers and research participants alike. From this perspective, the reminder of the book's five parts, the identification of three themes running through the chapters and the synthesis of those chapters' responses to the book's five organising questions presented above all highlight the broader relevance and the wider significance of these varied approaches to researching within the educational margins, and of these equally varied strategies for communicating and articulating the voices that can and should be heard within those margins.

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