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Ethnographic research with young people: methods and rapport

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Abstract

Purpose – This paper accounts for, and reflects upon, the research design and the methodological approach adopted in ethnographic research with young people. In particular, the purpose of this paper is to reinforce the significance of conducting qualitative participatory and innovative methods with young people, alongside the value of rapport building.

Design/methodology/approach – Qualitative participatory methods are understood as the most appropriate way to empower and respect young people in the research process. Alongside such methods the ethnographic nature of the research is discussed in conveying the importance of rapport building with young people in the field. In doing so the paper examines a number of important considerations when conducting youth research.

Findings – The triangulation of qualitative methods was fundamental in exploring and understanding young people’s lives in each locality and allowed for deep and meaningful explorations of specific themes. The additional and complementary methods employed alongside traditional methods were particularly suited to understanding young people’s everyday lives, as complex experiences are not always conveyed through traditional methods alone. Conducting participatory methods produced narratives around safety, security and governance in public places.

Originality/value – Being reflexive and adapting to a research setting in order to enhance the process of building and maintaining trust with young people is the most important facet when conducting youth research. Giving careful consideration to the impact of a researcher’s presence in the field needs to be carefully navigated.

Keywords Methodology, Ethnography, Young people, Rapport, Participatory

Paper type Research paper

Understanding and exploring young people’s lives

It is essential to foreground the way in which identifiable groups of young people are viewed and conceptualised in contemporary society when conducting research that explores their lives. This can be achieved through recognising the ways in which childhoods are socially constructed, appreciating the significance of child-adult relations and by applying a children and young person’s human rights framework. Socio-historical contextualisation enables an appreciation of “the adult-centred view of the child’s world” (Emond, 2000, p. 98). Viewing childhood as a social construction and emphasising the social, political and economic contexts within which it is lived provides the foundations upon which the methodological framework of this research was situated, which this paper discusses.

Young people are regularly scrutinised, monitored and regulated because they have not yet reached “adulthood”. As Goldson (1997, p. 19) argues “age is a fundamental determinant in the distribution of rights, power and participation and children by virtue of their junior years and their institutional dependence on adults have limitations imposed upon their citizenship”. Additionally, the structural relations of class, race, gender and sexuality shape particular constructions of childhood (Goldson, 1997) and reveal that not all childhoods are universally experienced in the same way and that youth is not a homogeneous category (Cohen, 1997). The impact of class, in particular, and the ethnographic research revealed “the continuing sociological relevance of class and place in understanding the lived experience” (MacDonald et al., 2005, p. 885).

The favoured methodological approach here, ethnography, places young people at the centre of the research as “experts in their own worlds” (Thomson, 2008; Abebe, 2009). When conducting research with children and young people, ethnography is a “natural choice”
method (James and Prout, 1997). Employing ethnographic methods shares and extends a tradition articulated by other youth researchers (see Thomson, 2008; Heath et al., 2009; Freeman and Mathison, 2009; Lewis and Lindsay, 2000), where an appreciation of children and young people’s rights are paramount. This commitment to a framework encompassing children’s and young people’s human rights explicitly acknowledges that “children have the right to say what they think […] and have their opinions taken into account” (UN Convention, 1989 the Rights of the Child). The qualitative methods employed in this research ensured that young people were given the opportunity to articulate their experiences and perceptions concerning policing, safety and security throughout the fieldwork.

Since the ratification of the United Nations Convention on the Rights of the Child (UN Convention, 1989), by the UK Government, various policies and procedural measures have been implemented to incorporate and promote children’s human rights. Within the academy, this has been accompanied by the increased use of participatory methods and approaches that facilitate the right of children and young people to participate actively in research. Although children and young people have not always been seen as active constructors of social meaning (Freeman and Mathison, 2009), over the past 20 years more progressive developments in the ways in which childhood and youth are viewed have impacted upon research. The “new sociology of childhood” recognised “the discovery of children as agents” and some commentators have argued that this has placed children and young people more centrally within key aspects of social science research (James et al., 1998, p. 164). The research methods presented here are symptomatic of the more explicit rights-based approach that has become more commonplace in youth research (James et al., 1998).

However, the naturalistic stance of ethnography has been criticised for its descriptive nature and lack of methodological rigour (see Emond, 2000). Much of the criticism revolves around a researcher’s impact on the data through their presence in the field and the recording and interpreting of observations (Hammersley and Atkinson, 1995). Foster (1996) considers these implications and the bias that may occur when a researcher interprets the data. Despite this, techniques such as reflexivity, triangulation and respondent validation can be used, and were in this research, to assess the validity of the data and to minimise any corrupting influence that my presence and role as a researcher might have imposed (Foster, 1996, p. 90). Acknowledging the importance of reflexivity, “where a researcher must question their own role in the research process” (Delanty, 2005, p. 121), was applied throughout the entire research process.

**Participatory research: dilemmas, distinctions and diversity**

The legitimacy of involving young people in research and the participatory nature of their involvement are debated issues. Indeed, the very definition of participation, and the various levels at which young people are enabled to participate in the research process, raises key questions for youth researchers. Gallacher and Gallagher (2008) and Boyden and Ennew (1997) define participation as taking part in some predefined activity. O’Kane (2000, p. 140) refers to participation as “handling things rather than just talking” and Pain et al. (2000) suggest that participation should result in positive change. Pain and Francis (2004) claim that young people should be involved in the research process from beginning to end. Subsequently, the varying ways in which young people might be involved in the research process have informed different perspectives on the subject. Some researchers advocate that this should be at the stage of research design (Kirby, 2004; Alderson, 2001; Holland et al., 2001). For others it should be at the stage of data generation (Murray, 2006; Clark et al., 2001), or in the interpretation of findings and at the stage of dissemination (Holland et al., 2001). Heath et al. (2009) suggest there are many reasons beyond a researcher’s control that restrict the involvement of young people at least at some stages of the research process. For example, dependence on funding, sponsors or time scales. The research presented here was funded by...
the Economic and Social Research Council and, as such, the submission of a research proposal and the designated research design developed before the fieldwork began, making it difficult to involve young people at the initial conceptual phrases of the research process.

There is a clear distinction between participatory methods and a comprehensive participatory approach in youth research literature. The latter is often characterised as research designed and conducted collaboratively between researchers and researched in order to enable positive action and change (Pain et al., 2000). More traditional research may include participatory methods, but this does not necessarily make it participatory research, and there is no such claim being made here. The research presented here combined “traditional” qualitative methods (interviews, focus groups and observations) with more explicitly participatory methods (visual methods and activities such as photography, brainstorming, mapping, drawings and flip chart exercises).

The more explicit participatory methods emphasised that the young people’s voices were central to the research and that they were regarded as “meaningfully engaged independent social actors” (Best, 2007, p. 10). Providing opportunities for a range of task-centred activities (Heath et al., 2009), including photography, drawn representations and posters, gave the young people a greater sense of control in the research process. Young people also chose which activities to participate and not participate in, which went some way towards redressing the power imbalances between the researcher (myself) and the research participants (Heath et al., 2009; Punch, 2000; Morrow and Richards, 1996; Morrow, 2008; Grover, 2004). It is argued that the participation of young people is generally experienced positively (Gallacher and Gallagher, 2008) and provides one way of empowering them (Cahill, 2004). Furthermore, exploring qualitative methods clearly had advantages over other forms of data collection. As Sapsford and Abbott (1996, pp. 336-337) argue, for example, quantitative research can often impose “its own conceptual schema on to the social world […] designed to obtain answers to researchers’ questions; it does not yield an understanding of people’s lives in-depth nor, generally, leave space for them to indicate what they regard as the important questions’. To gain understanding and extend knowledge about young people’s lives, an ethnographic approach combining innovative participatory and more traditional qualitative methods was deemed most appropriate in addressing the core research question and interrogating the underpinning primary objectives (James et al., 1998).

Research context
The overall objective of the research was to contribute to a contextualised understanding of the ways in which young people experienced policing, safety and security in their own localities. An ethnographic study was conducted in two coastal resorts, one in England and one in Wales, and access to young people was facilitated through centre-based youth organisations and outreach work[1] in the communities. The research participants were aged between 10 and 17 years old and the fieldwork extended over periods of six months in each locality (12 months in total). Qualitative data were generated with young people in the youth organisations through a range of methods including: participant observation, semi-structured interviews, focus groups, photographic methods, group discussions with flip charts and other visual techniques. Additional qualitative data were also generated through unstructured interviews with young people “on the street”.

Observing young people in their community habitus
Exploring and understanding young people’s day-to-day experiences could not have been achieved without thorough observational methods. The observational methods illuminated appreciative understandings of the particular fieldwork localities; young people’s perceptions and experiences; their engagements with each other, with local state agents/
agencies and within their community habitus more generally. Blumer (1969, p. 39) claimed “the task of scientific study is to lift the veils that cover the area of group life that one proposes to study [...] the veils are lifted by getting close to the area and by digging deep into it through careful study”. Blumer’s emphasis on the importance of “getting close” and “digging deep” in the locality (and subsequently with the young people) formed a principal rationale of the research. Observing the localities and young people’s movements, their interactions in and outside of youth organisations, and the young people’s particular terms and modes of engagement within their community habitus/locales were underpinning objectives of the research. Observational methods have been applied in other studies with young people in public space (Pavis and Cunningham-Burley, 1999) including “street” children in different countries (Vakaoti, 2009; Baker et al., 1996; Thomas and O’Kane, 1998; Young and Barrett, 2001). The ability to record directly observations about the environment and behaviour of participants without having to resort to accounts offered by others has been suggested as being a great benefit (Foster, 1996). Participant observation also formed part of the relationship and rapport building with the young people.

Selection of appropriate methods: planned and responsive approaches

When conducting empirical research, selecting the most suitable and appropriate tools “to obtain valid and reliable data – true answers to questions, not distorted by the methods of collection” was of vital importance alongside a commitment to a human rights-based conception of participation (Wilson, 1996, p. 98). During the 12 months of intensive fieldwork, complementary methods were also employed on a more opportunistic and/or naturalistic level. This accounted for the differences in each research setting. Youth organisations, where the majority of the data were collected, were very different in nature and purpose. However, activities including group discussions using flip charts were regularly employed in both organisations as a means of gaining young people’s viewpoints on a certain issue. Methods were therefore adapted to the activities that young people were used to engaging in. By doing so, additional information, meaning and understanding about the young people in each case study site were collected. Such adaptive responsiveness accords with the work of Beazley (2003, p. 183), who also collected “spontaneous drawings and mental maps drawn by the children”. The spontaneous participatory techniques, such as brainstorming, flip charts and drawings all proved to be effective complementary methods of data collection. The young people were familiar with working in this way and, as such, I adopted this approach as an additional method of data collection. Writing questions on flip charts for the young people to answer with marker pens was a popular and well-used technique in both youth organisations. This was used as a standalone exercise on some evenings and was also included in the focus group sessions. A further separate method implemented was a participatory mapping exercise pertaining to safety and security in public space. I enlarged a map of the locality to A3 size and provided various coloured stickers and pens. I invited the young people to devise a code for the stickers and then place them on the map to represent places where they felt safe, places where they felt unsafe and places where they walked or visited. This method has been used effectively by others to explore young people’s understandings of space and place (see Kintrea et al., 2008; Reay and Lucey, 2000; Pain et al., 2000) and it uncovered young people’s perceptions and experiences of policing, safety and security in public space through a different method of communication. Using another participatory visual method such as “photovoice” emphasised the fun and participatory nature that qualitative methods can offer. Photovoice, a concept developed initially by Wang and Burris (1994), is a participatory research strategy which enables participants to take photographs of places of significance in their community and then discuss these with a researcher. Employing visual methods in the research emphasised both the participatory imperative and allowed the research
“to incorporate knowledge that is not accessible verbally” (Pink, 2004, p. 361). This enhanced the participation of young people in the research and was significant in the rich and meaningful data that it produced.

This "gathering [of] unanticipated information" (Sorhaindo and Feinstein, 2007, p. 7) presented itself weekly at the youth organisation when young people would sit down and draw or make things. Young people would draw posters for me representing their coastal resort or would “brainstorm” on coloured paper with coloured pens ideas and themes that I suggested relevant to the research. These additional visual methods allowed for different forms of communication that the young people felt most comfortable with (Christensen, 2004; Thomas and O’Kane, 1998) and similar to Punch (2002) the visual aids also provided an opportunity on which to probe more in-depth information about the particular theme which was utilised in the interviews.

Semi-structured interviews were conducted to collect in-depth rich narrative accounts of each young person’s experience and perceptions, and comprised vital data. They became useful “verification tools” (Vakaoti, 2009, p. 444) and emphasised the complementary nature of the other methods used. Whilst this traditional qualitative method proved successful in its own right, this would not have sufficed on its own and felt to “traditional” and “not as appealing” as other methods which young people participated in. This flexible and responsive approach provided further insights into the young people’s perceptions and experiences. Adapting to the setting, using a triangulation of methods, and taking a reflexive approach therefore, benefited the overall research process I believe for researcher and participant. However, none of these methods could ever have been conducted successfully without the building and maintaining of rapport with the young people in each locality.

Building and maintaining trust with young people: reflections from the field

The careful and deliberate effort to build and maintain a rapport with the young people was of the upmost importance in the research process. Young people were central to the research process and without their participation such research would not exist. The ethnographic nature of the research allowed me to spend quality time in each locality before data collection commenced. In both localities I did not conduct the interviews, photovoice exercise or focus groups until four months had passed. This time enabled me to spend quality time with the young people. Many days and evenings were spent in each youth organisation participating in the activities that they were used to. The majority of the time was spent listening. Through building up a good rapport and trust with the young people and, as far as possible, unobtrusively “blending” in with their environment, the impact my presence might otherwise have had on distorting the data was mitigated. In order to “gain acceptance” by those that I was researching (Heath et al., 2009, p. 49) I tried to fit in and adopt a role which was a balance between observer and participant similar to that of Mandell’s (1991) “least adult” role. If my role was to have been just an observer, my presence might have been questioned and thought of to be “strange” as in Pollard and Filer’s (1996, p. 94) study. To some extent my role enabled me to view the social world the young people were part of through encountering “what they experience and do, individually and collectively, as they engage in their respective forms of living […] the world of everyday experiences” (Blumer, 1969, p. 35). By doing so I recognised how the presence of a researcher can impact upon the data collection and analysis. Threats to “validity” and “reliability”, which Foster (1996, p. 88) refers to as both “personal and procedural reactivity”, suggest how participants can act differently because they are aware of the researcher’s presence. By spending six months in each locality and not conducting methods until I felt a rapport was built with the young people who went some way to ensuring this.

Over a period of months I would remind the young people of why I was there and that in the future I would ask them if they would like to participate in the research I was conducting. This was discussed over four months making sure that first, the young people
were fully informed about the nature of the research and trusted me and second, when asking about the issues that impacted them on a daily basis, the narratives that I would be collecting would be a “truthful” as possible. In acknowledging that “children are not only future members of society, they are active participants within society” (Goldson, 1997, p. 27), the methods employed in this research gave voice to the young people and aimed to provide a greater understanding of their lives. By the time that I started the data collection I honestly believe that their experiences and perceptions entrusted to me were as close to the truth as one could get. Therefore, this paper advocates for time and dedication devoted to the building of rapport with young participants.

A researcher’s role: self-reflection

Reflexivity allowed for the continual monitoring of my role throughout the research process, evaluating the extent to which my methods were reliable and valid, the optimisation of young people’s participation and the ethical integrity of the research. For these reasons triangulation was consistently applied in order to validate all sources of data collection alongside self-reflection. This is regarded as a “means of confirmation and as a way to provide information one data collection strategy might not have generated” (Freeman and Mathison, 2009, p. 148). As Foster (1996, p. 91) suggests “if a researcher’s conclusion is supported by other data then we can be more confident of its validity”. By spending six months in the youth organisations in each of the fieldwork sites, a potential risk of what has been commonly termed as “going native” (O’Reilly, 2009, p. 87) was raised. This term, originating from Bronislaw Malinowski’s (1922) ethnographic research, refers to “the danger for ethnographers to become too involved in the community under study, thus losing objectivity and distance” (cited in O’Reilly, 2009, p. 87). It has been postulated that if a researcher identifies “so closely with one’s subjects that one inadvertently skews his [sic] description and analysis of the world being portrayed” (Monti, 1992, p. 325). By being reflexive throughout the duration of the fieldwork, I was careful to distinguish between my own interpretations and feelings that were recorded in my field notes, and data collected through interviews, visual techniques and each of the other methods of data collection. Writing a research journal everyday provided “emotional and mental distance” (O’Reilly, 2009, p. 116) from the participants and the settings. It was also a valuable reflective tool, where observations made in my journal provided additional verifications to the participant’s narratives. Conducting research with young people, and building a rapport with them, does not necessarily mean that “you have to turn native in order to argue from the native’s point of view” as Geertz (1983) has contended (cited in James, 2001, p. 254). The challenges for the ethnographer are to be aware of both the closeness and the distance that they have with their participants (Alvesson, 2003).

Being consistently reflexive throughout the process of data collection and data analysis, in particular reflecting on my role as a researcher, allowed me to overcome these concerns (Rubin and Rubin, 2005). As Delanty (2005, p. 119) acknowledges, “reflexivity is the key to the epistemology of the standpoint of the social actor”. Therefore, standpoint epistemology affirms that if a researcher has “insider” status, they therefore have a privileged role over a researcher with “outsider” status (Becker, 1963; O’Reilly, 2009; Heath et al., 2009). However, some reject the view that a researcher needs to share the same characteristics as those they are researching (Hollands, 2003; Nairn et al., 2005; Taft, 2007). I adopted a role that acknowledged the differences between the researcher and the researched (Mayall, 2000) even if my overall perspective was “appreciative”. Even though I was older (aged 28 at the time of fieldwork) than the young people that participated in the research, it was not a vast age gap as can often be the case when conducting youth research (see Morris-Roberts, 2001; Armitage, 2012; Proweller, 1998). However, it did not give me “insider status” as such (Heath et al., 2009). The young people at both case study sites thought that I was much
younger than my age. Whether this may have benefited me in building rapport with the young people or not is debatable. I believe it was the art of listening and maintaining ethical integrity that was of paramount importance (Pattman and Kehily, 2004; Frosh et al., 2002).

Leaving the field
After a period of intensive fieldwork, leaving each case study site was an important part of the research process. The “disengagement” process (Snow, 1980) raises ethical and moral questions where the researcher finds themselves “confronted with a set of questions and issues concerning his/her indebtedness and moral obligations to those persons studied” (Snow, 1980, p. 114) raising the fundamental question “do we ever leave the field?” (Stebbins, 1991, p. 248). Hammersley and Atkinson (1995) point out that most ethnographers retain acquaintances with those who they meet during fieldwork and “leaving the field” does not necessarily mean that these relationships have to end. Recognising the emotional elements of the fieldwork process (O’Reilly, 2009) and the rapport that had been built over each six-month period, it was important that leaving the field was given careful consideration. In line with Lofland and Lofland’s (1995, p. 63) “etiquette of departures”, the young people at both case study sites were informed ahead of time when I would be leaving and the reasons why, and assurances were given that I would keep in touch. The successful rapport building that developed over time with the young people was for me the most important part of the research process and resulting from this has led me to feeling like I have not actually “left the field”. Since the end of the fieldwork, visits have been made on a regular basis to each locality and I still remain in contact with some of the young people through social media, e-mail and telephone calls. After “physically leaving the field” young people continue to update me on the progress they are making in their lives. For example, going to university, getting a job and becoming a parent. I feel deeply privileged to still be part of their lives. Engaging and the building of rapport with young people over an intense period of time I feel is a reflection of that. As a qualitative youth researcher, wanting to explore and gain meaningful insights into young people’s lives, I believe cannot be pursued in any other way. Precedence has to be given to the building and maintaining of trust which subsequently develops into a meaningful relationship between researcher and participant.

The case for ethnography and participatory methods with young people
By putting the voices of young people at the centre of the research, this study represents a challenge to the quantitative focus of much mainstream criminology and research that tends to be dominated by narrowly prescribed administrative agendas (Tombs and Whyte, 2004). The research discussed here produced data that were richly appreciative of young people’s experiences and thereby reasserts the case for ethnographic approaches. Becker (1958, p. 657) points out that social scientists should not only strive to collect many instances of an identified phenomenon, but also seek to gather “many kinds of evidence” to enhance the validity of a particular conclusion (Kusenbach, 2003, p. 7). Multiple methods were therefore employed in order to enhance the quality and validity of this research, whilst emphasising the necessity of young people’s participation in matters that affect them (UNCRC, Article 12 Right to Participation, ratified in 1991 by UK Government). In recognising the importance of the “new sociology of childhood” (James et al., 1998), which promotes young people’s independent and active voice, the methodological design aimed to optimise the participation of young people in the research process.

Walters (2005, p. 95) argued that there has been “a growing trend of nervousness surrounding criminologists who engage in ethnographic studies”. This research has demonstrated some of the reasons for this nervousness and has outlined and foregrounded the very real ethical dilemmas that researchers can face in “getting up close” to young people. Risks included the prospect of “going native” and the potential dangers that might
be presented when entering marginalised communities as an unfamiliar researcher (Yates, 2004). Importantly, this research identified strategies which can be employed to successfully negotiate such issues and outlined how ethnographic research can be conducted in the current methodologically risk averse climate (Yates, 2004).

This paper has hoped to reassert the role that ethnography can play in exploring the lives of young people and advocates using a range of methods, both traditional and innovative, when conducting research with young people (Punch, 2000). In doing so, the ethnographic method pointed the analytical gaze into the lives of young people in coastal resorts and produced original knowledge regarding their experiences and perceptions they associated with policing and their conceptualisations of safety, and security in two very different contexts – one an excluded and marginalised context and the other a more affluent and “successful” consumption space. The study incorporated young people’s voices centrally into the research and generated data that challenges common assumptions about young people’s use of public space in multiple ways.

Note
1. Outreach work carried out by youth workers attempting to attract young people into a particular service or activity by delivering information to young people in public (Kaufman, 2001; Crimmens et al., 2004, pp. 13-14).

References


Further reading


About the author
Dr Sarah Tickle is a Lecturer in the Department of Criminology at Liverpool John Moores University (LJMU). In 2015 she was awarded a PhD for her thesis on the ways in which young people conceptualised and experienced policing, safety, security and harm in two coastal resorts. Sarah completed her PhD at the University of Liverpool with funding from the ESRC and was also awarded the prestigious Duncan Norman Research Scholarship. She is a Member of the Centre for the Study of Crime, Criminalisation and Social Exclusion (CCSE) at LJMU. Dr Sarah Tickle can be contacted at: s.j.tickle@ljmu.ac.uk

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The role of triangulation in sensitive art-based research with children

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Abstract
Purpose – The purpose of this paper is to highlight the critical role of triangulation to create authentic analytical frameworks amidst contradictory participant narratives in sensitive art-based research (ABR) with children.

Design/methodology/approach – Multiple qualitative case study research included three months of participant observation, individual semi-structured teacher interviews and open-ended art-based interviews using the Draw-Write-Narrate method (Ogina and Nieuwenhuis, 2010) with upper primary students in two schools in Kirinyaga County, Kenya.

Findings – The art-based approach to student interviews, combined with participant observation and teacher interviews, provided a child-centred process that illuminated students’ understandings and experiences while minimizing risks to participants. Its application requires researchers to recognize data collection and analysis as subjective processes that strongly benefit from triangulation to interpret a diversity of perspectives that may not easily align.

Originality/value – As ABR with children increases in popularity, it is important to identify challenges in the process of analysis and meaning-making. This paper identifies triangulation as a valuable tool for handling the challenge of diverse perspectives from child participants, particularly in conducting sensitive research that may increase the likelihood of contradictory narratives.

Keywords Children, Kenya, Triangulation, Art-based research, Student voice

Paper type Research paper

Art-based research (ABR) with children has proliferated in recent years, particularly when tackling sensitive subject matter. The use of open-ended art-based interviews to investigate gender equality and school safety in primary schools in Kirinyaga, Kenya identified benefits and challenges related to power, perspective, protection and interpretation. These issues are explored here with the intent of sharing emergent findings about the critical role of triangulation in ABR with children to enable researchers to build an accurate descriptive analysis amidst distinct and at times contradictory narratives. Triangulation in qualitative research, defined as the combination of multiple methods to study one phenomenon (Houghton et al., 2013), enhances researchers’ ability to create a clear and authentic narrative reflecting diverse perspectives and experiences in sensitive research with children. This research acknowledges children’s rights to have a say in decisions that affect them, necessitating a high level of student voice, opinions and perspectives in the research methods. The expansion of child-friendly research methods has corresponded with the rise in recognition of children’s rights, including the establishment of 1989 United Nations Convention on the Rights of the Child that formally identified children’s right to have a voice in decisions that affect them (Bell, 2008). In this study, triangulation was key to situate child participants’ diverse perspectives in the context of the schools. Following three months of participant observation, individual semi-structured interviews were conducted with teachers and individual open-ended art-based interviews using the Draw-Write-Narrate method (Ogina and Nieuwenhuis, 2010) were conducted with upper primary school students in two schools. The art-based approach to student interviews, combined with participant...
observation and teacher interviews, enabled a student-centred process that illuminated students’ understandings and experiences and was designed to be child-friendly, encouraging and fun while minimizing risks to participants. Its application, however, requires researchers to recognize data collection and analysis as subjective and complex processes that involve bridging and interpreting a diversity of perspectives that provide contradictory descriptions of the same school spaces.

Data collection took place in 2015, using multiple qualitative methods to examine the relationship between gender safety and violence in schools and student learning processes in two case study primary schools in Kirinyaga County. The methodology emphasized student voice to facilitate a critical perspective on the ways in which the gendered norms and behaviours in primary school learning environments relate to students’ social and academic development. The term “gender violence” is defined as “physical, verbal, psychological and emotional as well as sexual violence; it also includes the fear of violence, both between females and males and among females or among males” (Leach and Humphreys, 2007, p. 52, emphasis in original). It acknowledges that all violence is gendered and that gender violence, commonly conceived of as sexual harassment, also includes bullying and corporal punishment (Dunne et al., 2006). The study was based on the notion that understanding gender violence in schools (GVS) is incomplete without simultaneously addressing gender safety in schools (GSS). School safety is not a static end goal but rather a process that responds to the social norms influencing the school. A gender safe school is defined by Stein et al. (2002, pp. 41-42) as a place where girls and boys:

[...] have freedom to learn, explore and develop skills in all academic and extracurricular offerings to be psychologically, socially and physically safe from threats, harassment or harm in all parts of the school [...] [acknowledging and challenging] how conventional beliefs about masculinity and femininity constrain and undermine learning, participation and movement [...].

ABR methods were the study’s primary means of exploring students’ voice, perspective and experiences related to this conception of GSS as an absence of gender violence and an empowerment of students to challenge limiting gender expectations.

Building upon the extensive literature documenting high rates of gender violence in Kenyan schools (Abuya et al., 2012; Ruto, 2009; UNICEF Kenya et al., 2012), we undertook two qualitative case studies to examine the presence of GSS, how it interacts with gender violence, and the ways that both influence students’ learning processes. The project comprised of the data collection for the principal researcher’s (first author, hereafter referred to as Catherine) Doctoral Thesis. To facilitate the student interviews in local languages (Kikuyu and Kiswahili), Catherine recruited and hired the second author (hereafter referred to as Mary) to conduct transcription and translation. Mary also contributed significantly to data analysis and helped Catherine understand the cultural background that shapes and influences the data. Together, the authors drew upon their complementary research experience, skill sets and perspectives to consider the topic from multiple vantage points. Mary joined the project part-way through after Catherine had completed the participant observation stage, bringing intimate knowledge of Kikuyu culture and language and extensive experience conducting interviews in Kenya that was critical for adapting the interview process to respond to the local context. Catherine was more familiar with the immediate context of the two schools, having worked in them as a volunteer teacher and observer during the previous school term and consulted with administration, teachers and students on research design. These two perspectives provided the foundation upon which the authors discussed, debated, modified and adapted the student interview processes and analysis. The Draw-Write-Narrate method enabled child participants to frame the discussion in terms of what was most important to them within the broader context of the research question. This allowed new themes to emerge that would likely not
have with a traditional semi-structured individual or focus group interview. Numerous ethical and analytical challenges emerged from the practice, including the analysis of contradictory student reports of the prevalence of school violence when under-reporting of violence in research is a recognized phenomenon (Ellsberg et al., 2001). We consider some of the factors that may have led to under-reporting of violence and the emergence of contradictory messages and the role of triangulation in giving value to all student voices while building a clear analysis that acknowledges different perspectives.

Literature review
Over the past few decades, there has been increasing recognition that many “traditional” research techniques including interviews, surveys and questionnaires are inappropriate for research with child participants, particularly when researching sensitive subjects and working with children from marginalized groups (Leach, 2006). Research paradigms have shifted to consult children directly about their experiences and perspectives and viewing them as experts in their own schools and communities (Barter and Renold, 2003). Traditional research methods such as questionnaires, surveys and interviews are often considered ill-suited for use with children as they are designed for adults’ interests and ways of generating knowledge, they can be intimidating to children and presume a particular level of language, comprehension and literacy, and they are often boring and tedious for children (Barker and Weller, 2003). All research processes are infused with power discrepancies that privilege the researcher to some degree as the organizer and coordinator of the initiative, although steps can be taken to share decision-making power with participants (LeCompte, 1995). Power discrepancies are exacerbated with child participants given the adult researcher’s age, physical presence, experience, institutional affiliation and role directing the research process (Clark, 2010; Kiragu and Warrington, 2012). These discrepancies may be exacerbated by factors including the location of the interview, such as a school, which holds its own set of power dynamics. In an effort to reduce the power disequilibrium, participatory research methods are considered more suitable to children based on their interests, strengths and modes of communication (Barker and Weller, 2003).

ABR with children is often used in education and originated in school-based research (Backett-Millburn and McKie, 1999). It can take many forms, but most often uses visual approaches such as map-making, photography or drawing. The art itself is usually combined with an oral component to enable child participants to explain the meaning in the drawing. Without this space for the child’s explanation, there is significant risk that the meaning can be misconstrued and misinterpreted by the researcher (Barker and Weller, 2003). These approaches are distinct from conventional understandings of research that seek to document frequency, prevalence and effect of behaviours and activities. Instead, the emphasis is on knowledge production and creation where researchers and participants collectively contribute to a new understanding of a phenomenon in a given space, drawing from a social constructivist concept of collaborative learning (Clark, 2011). The participant’s art is not the primary output, but rather facilitates and frames the discussion between researcher and participant. ABR is often used to provide a forum for participants to reflect on sensitive issues they may otherwise be uncomfortable discussing, including GVS (Mak, 2006).

ABR is considered an ideal participatory, empowering method that enables children to co-construct knowledge with researchers (Alderson, 1996) but many ethical issues arise. Interpretation presented the largest challenge in our application of the Draw-Write-Narrate approach. As we confronted contradictions emerging in the narratives of different students, we found ourselves questioning how to accurately depict the prevalence of gender violence in student experiences when the experiences reported and descriptions of the school environment were so diverse. Ultimately we had to listen carefully to all the stories of our participants and consider students’ motivations to share the stories they told us.
Establishing a narrative from their individual and collective voices was possible due to a process of triangulation that situated the student voices within the school context that had been observed and reported on in participant observation and teacher interviews. The following describes this process of analysis and interpretation, culling a diversity of experiences, observations and expressions of agency to get to the heart of what upper primary students in Kirinyaga value in relation to gender safety and violence at school.

Methodology
The Draw-Write-Narrate method used was adapted from Ogina and Nieuwenhuis’ (2010) method applied in Ogina’s work on the educational needs of orphaned adolescents in South Africa. The method provides child participants with three tasks that facilitate a storytelling narrative about their lives: following an introductory session where the researchers used drawings about their own lives to demonstrate the process and establish a relationship with the participants, child participants were asked to tell researchers about themselves by drawing pictures and describing their drawings in writing. The examples from our own lives were used to encourage students to describe both things that they liked and did not like about school and showed a drawing could illustrate a personal experience. Ogina and Nieuwenhuis wrote that they considered a personal example to be an important means of illustrating that “all people have a story to tell and that it is alright to share their story with others” (p. 54).

The final step was to use the drawings during individual interview sessions, asking participants to explain their drawing and answer follow up questions based on the drawing. Interviews were open-ended. Each interview began by asking the student to describe their drawing. After they did so, the researchers asked follow up questions based on what the student described about the drawing, their school experience and their likes and dislikes. This method proved to be effective for enabling participants to determine the direction of the conversation by talking about what was most important to them. Like any method, it needed to be situated within reflective identification of possible risks to participants, researchers and community members within the specific research context. We employed a “situated ethics” approach, involving continual ethical negotiation to respond to the power relationships between the researchers, the community and the stakeholders that shaped the research process and consider their effects on participants (Simons and Usher, 2000). Continuous negotiation required making difficult decisions to mitigate the possibility of risk to participants, particularly child participants. For example, one such difficult decision involved reducing the extent of the participatory analysis that had been planned – involving group discussion and reflection on emerging results – in order to prioritize the anonymity of the participants and the confidentiality of the research process.

Our research question and subject was narrower in scope than Ogina and Nieuwenhuis’ thus the method required modification to focus on issues of gender safety and violence in school while maintaining a breadth and flexibility that allowed students to explore issues of importance within that scope or deviate entirely if the issues were not significantly important to them. Instead of asking participants to draw a picture describing their lives broadly, we asked them to draw a picture showing how they feel when they are at school and encouraged them to illustrate both what they like and do not like about school. We began student interviews with an introductory session with the whole class from which participants were recruited – a Standard 8 class in the rural school and a Standard 7 class in the town school. The entire class did the drawings so as to minimize feelings of exclusion among students not selected for interviews. During the introductory sessions we explained the objective of the research project, consent and the process, providing definitions in child-friendly language for the words “research” and “safety” and explaining the process in English and Kiswahili. We provided two examples of our drawings showing how we feel at school to give them an idea of what their drawings could look like, (Plate 1), both with
positive and negative elements to encourage students to reflect upon positive and negative elements of their own school experience.

We tried to balance flexibility to respond to students’ interest in participating with time limitations and the need to work around the schools’ schedules, ultimately conducting student interviews with 15 students (9f/6m) in the rural school and 16 students (9f/5m) in the town school, including member check interviews with four students (2f/2m) in the rural school and two students (1f/1m) in the rural school. We obtained student consent to participate in interviews by asking students to confidentially write “yes” or “no” on slips of paper, allowing children to self-select to participate or discreetly opt out. We obtained parental consent by mobile phone instead of sending consent forms because of high levels of illiteracy and the prominence of Kikuyu, which is primarily an oral language. Consent was discussed with participants at the outset of each interview, confirming their interest in participating and asking them to practise what they would say to stop the interview if they chose to. We paid attention to their comfort level during the interview and, if a student appeared uncomfortable by speaking quietly, declining to answer a question or looking down, we offered them the opportunity to stop, reassuring them that there would be no negative consequences for doing so. In the handful of cases when we did this, several participants took the option to stop while others stated they were comfortable continuing. This multi-step process integrated the continuous negotiation of consent throughout recruitment and each interview (Tisdall, 2003).

A significant challenge in maintaining confidentiality and anonymity of student participants was conducting the student consultations in their school. The explanations of the methodology and the provision of feedback on initial results to students took place with their teachers present in both schools, although the teachers opted to leave when the drawing portions commenced. Their teachers’ presence could have curbed students’ willingness to ask questions and provide input on the methods and results. The individual interviews took place in an empty classroom in each school. While we tried to invite the students to participate without their teachers’ knowledge, teachers could have easily observed students walking into and leaving the classroom and identified that they had participated in an interview.
Similarly we often had to ask their fellow students for the scheduled student’s whereabouts, revealing to their peers that the student was going to participate in an interview. Distrust in the anonymity and confidentiality of the process may have caused some students to avoid discussing negative elements of their school experiences.

Students could conduct the interview in English, Kiswahili or Kikuyu; most opted to speak in a mix of all three. Each interview began by asking the student to describe her or his drawing. When the student finished describing the drawing we asked follow up questions and gradually raised the subjects of GVS and GSS as related to the drawing. Once the interviews were completed, we photographed the drawings and gave all the originals back to the students without identifying the students that participated in interviews. Constructivist grounded theory was the primary analytical method used, conducting constant memoing and comparisons across data sources to develop an emergent theory based on the experiences of participants. Coding consisted of three main phases: first, initial coding including naming each line or segment of data; second, a focussed, selective process to sort, synthesize, integrate and organize data based on the most frequent or significant initial codes; and third, theoretical coding to identify possible relationships between the categories developed in the second stage (Charmaz, 2006). We presented initial results back to the class in clear language designed to be accessible to children and asked students to work in small groups to identify how they could address the issues raised to make their schools safer places to learn. This type of participatory analysis can disrupt silence around a topic and create space for change through dialogue and empowerment of participants (Mitchell et al., 2006). Stronger participatory analysis would provide another way to validate the emergent research narrative, but the sensitivity of our research topic obliged us to limit the extent of participatory analysis as we could not guarantee confidentiality if a student disclosed an experience of violence during a group discussion. Furthermore, because there were teachers present when we shared the findings, we excluded results about teacher misconduct, as we did not want students to experience negative consequences after we left. We also stressed that data gathered from both schools did not reflect the actions and beliefs of all students, and were not necessarily a reflection of any of the students that had participated at their school. These decisions were made to avoid giving teachers a reason to punish the students for perceived bad behaviour described in the study.

Advantages of ABR

Particularly given the sensitive nature of our research topic, it was important to try to create an atmosphere and activity would be students were comfortable and interested. Beginning interviews with the explanation of the drawing enabled students who were shy to spark a discussion and provided a point of clarification to return to during moments of uncertainty. For example, during one interview a female student stated that the school was a very positive place but had referenced in her drawing sitting under a tree by herself. When asked about this instance in her drawing, she explained that a teacher had sent her away from class because she had been late and so was not allowed in. This allowed us to discuss problematic elements of the school environment. In some cases, students drew examples of violence that they then resisted discussing orally, while in others students drew an entirely positive drawing but then opened up to talk about issues of violence that had not been present in the drawing. We did not press students to discuss violence if they declined to do so, but the inclusion of violent images or descriptions in some drawings provided a counterpoint to indicate that students who stated orally that no violence existed in the school may have been reflecting their discomfort or disinclination to talk about these issues rather than a total absence of violence in the schools. Combining discussion with the drawing created different avenues for addressing difficult subjects and provided participants with multiple avenues of self-expression.
Our research topic focussed on a specific question of GSS and GVS and how they influenced students’ learning processes. We wanted to explore this relationship in ways that made sense to the student and to allow the student to bring up other issues that may have been more important to them. By providing students with the open-ended request to draw how they feel when they are at school, we got a range of answers, some of which did depict issues of both safety and violence and led directly into these conversations. They also brought up other elements of school valued by students that may not have arisen, had we used a standard interview guide that focussed specifically on the topic we were investigating.

For example, we learned that friendships highly influenced students’ attitudes in school, including their feelings of safety. Many students drew pictures of themselves playing with friends but also drew themselves being excluded, sitting by themselves under a tree when their friends refused to play with them. The friendship element introduced a subtlety to the dimensions of GSS and GVS, leading to findings that students’ experiences of safety include relying upon their friends for not only companionship but also for protection and assistance. This was particularly prominent among girls. These elements arose because students had the opportunity to provide their own narrative about their school experience. This experience reflected Ogina and Nieuwenhuis’ (2010) finding that the process enhanced understanding of diverse children’s perspectives by enabling the participants to take the subject matter in different directions before the interview begins.

**Handling contradictions**

A challenge in emphasizing student voices was interpreting the contradictions that emerged about events that had taken place in the school. This arose in many participants’ reluctance to provide negative information about their schools. For instance, one girl described how all Standard 7 and 8 students in the school had been collectively beaten by multiple teachers for not attaining the examination pass mark. Other students said they had never experienced or witnessed corporal punishment in the school. When we asked other students in the same class about the reported incident, some denied that it happened while others confirmed it but downplayed its severity, saying fewer teachers had been involved. Similarly, some students’ claims that forms of violence such as bullying never occurred in the school were contradicted by the researchers’ first-hand observations of bullying on the playground. It was thus difficult to determine the prominence of GVS based on the students’ contradictory assertions. We suspected that students wanted to avoid talking about negative experiences out of fear, possibly concerned that they would get punished by teachers or bullied by peers. This could have been diminished by holding interviews with students outside of the school, but unfortunately this was not an option as all of our ethical protocols and parental consent were tied to the research taking place on school property.

In our description of confidentiality during the introduction, each interview and within the consent forms, we clarified to students that we would not reveal anything they said to anybody else, unless they revealed that a child was at ongoing risk of being severely harmed. We assured them that in this case we would talk to them about it before sharing the information with anyone else, however they may have been confused as to what level of harm would have necessitated a revision of this confidentiality agreement. We intentionally left it broad so that we could decide when re-negotiating confidentiality was necessary on a case by case basis; this was considered essential from a child protection standpoint even though we were aware that it could lead to under-reporting.

Students at the rural school were more forthcoming in their discussions of violence, particularly corporal punishment, than the town school. This likely reflected that violence was more common in the rural school, but the degree to which it was masked by under-reporting in the town school was unclear. We considered numerous possible explanations for why students would have denied the presence of school violence.
One possibility was Catherine’s association as a teacher in the school during the previous term, which may have contributed to their decision to withhold negative information about the school with someone they considered their teacher. In the rural school, where Catherine had fewer interactions with students, the participants more frequently reported negative practices and criticized systems of violence within their school, possibly as a result of the relatively lower level of interaction they had had with Catherine prior to the interviews. While it is important to establish a strong and trusting relationship with participants in advance, the nature of that relationship and the position of the researcher could limit participants’ willingness to reveal negative information. Evidence from other studies indicates that even being in the school will compel children to want to give researchers the “right” answer, as they feel is expected from a teacher in class (Donaldson and Elliot, 1990). Our interviews’ occurrence in the school, combined with Catherine’s identity as a temporary teacher, may have compelled students to try to give a purely positive portrayal of school.

Researchers’ status as “insiders” or “outsiders” in a community influences the opportunities and barriers that they face in gaining access and permission to conduct research, as well as the trust and the nature of their relationships with the participants (McAreavey and Das, 2013). Another factor that may have contributed to under-reporting was that Catherine was considered unique as a white foreigner in a rural area where many people had never interacted with a white person. The students may have wanted to impress her by telling her how good their school is or to shape her portrayal of the school to an “outsider” community (Harris, 2015). While she attracted attention in both schools, this effect may have combined with her stronger presence in the town school to lead to reduced negative reporting. She had taught classes to the students interviewed in both schools, but less frequently and consistently in the rural school than the town school. The age of the students interviewed may have also been a factor. Students in the rural school were in Standard 8 and those in the town school were in Standard 7. Our preference had been to interview Standard 8 students in both schools, however the town school preferred that we interview Standard 7 students so as to not distract Standard 8 students from their upcoming exit examinations. It is possible that the relative maturity of the older students interviewed in the rural school made them more critical than the slightly younger students in the town school, who had a stronger sense of loyalty to the school and their teachers. Finally, students may have chosen not to disclose sensitive information because they simply did not want to and were using their agency to exercise a decision to not provide this information to researchers. Non-communication among participants may be a strategy rather than a deficit. Williamson and Butler observe that, “Increasingly, our research suggests, children and young people endeavour to conceal the problems of their social worlds from adults in order to avoid being ‘humiliated’ by misunderstanding, misrepresentation and misplaced responses” (1995, p. 305). Most likely, nondisclosure of school violence happens for a combination of the reasons listed above and will remain a common issue researchers need to confront when conducting sensitive research with children. Accepting and understanding the prevalence of nondisclosure and under-reporting leads to the question of how to navigate the reported differentiated experiences and still represent student voice as authentically as possible. When children share diverse perspectives, the analytical choices the researchers make are shaped by the researchers’ standpoints and ways of seeing and understanding children (Morrow and Richards, 1996).

**Triangulation**

Triangulation was included in the research design to provide the researchers with a more complete understanding of the research context, to incorporate a diversity of views and perspectives, and to allow both formal and informal interactions with research participants. It also proved to be a useful process for creating an analytical narrative that is respectful and
reflective of the diverse perspectives children shared with us. When faced with contrasting
statements, we considered numerous factors in crafting analytical themes based on these
statements. We thought about: reasons students had to reveal or obscure events; depth of
description provided; corroboration by other students; our experiences within the schools
being researched and others in Kenya; prevalence of the behaviour reported in existing
literature on primary school culture in Kenya; and validation of emergent themes in member
check interviews. In the example listed above, we accepted the participant’s description of the
incident where a group of students had been beaten for the poor exam performance, despite
statements from some of her peers that it had not occurred. We made this decision
considering; the reasons described in the paragraphs above accounting for why students may
be declining to discuss the negative elements of the school experience; the participant’s very
detailed description of the incident and her emotional reaction when describing it to us, crying
as she recalled that had she wanted to drop out of school but remained at her mother’s
insistence; confirmations received during member check interviews; the prevalence of corporal
punishment in the researchers’ experiences in Kenyan schools and the extensive literature
documenting its ongoing practice (Archambault, 2009; Mweru, 2010); and identification of
corporal punishment as an ongoing or occasional practice in at least one teacher interview in
each school. To produce a cohesive picture of school life and student experience drawn from
student narratives, it was necessary to situate the findings from students’ art-based interviews
within the larger context of what we knew about the schools drawn from other data sources,
the surrounding literature and our own experiences. This highlights the critical role of
triangulation in clarifying, confirming and completing research findings, especially when
dealing with sensitive research with children.

Carter et al. (2014) identify four different types of triangulation: method triangulation
(multiple methods collecting data about the same phenomenon), investigator
triangulation (multiple researchers providing observations and conclusions), theory
triangulation (different theories to analyse and test data) and data source triangulation
(data from different populations or types of people). We drew upon three sources of
triangulation. Three months of participant observation in two different schools provided a
stronger sense of school culture, including observing cases of corporal punishment first
hand. Having two researchers allowed us to offer different explanations, theories and
conclusions to contextualize student narratives. It was particularly useful to have the
combination of an “outsider” and an “insider” to provide different lenses and familiarity
with the context. Finally, interviewing teachers and school administrators as well as
students fostered a sense of completeness and confirmation by obtaining multiple
perspectives (Houghton et al., 2013). Triangulation enabled us to consider student
perspectives while deepening our understanding of what the diverse stories tell us about the
prominence of GSS and GVS. Respecting the perspectives of all students compels us to
create an over-arching narrative that takes each student’s story at face value, considering
their motivation for telling it to us and accepting them as equally valid and valuable.
We simultaneously chose to incorporate the participants’ descriptions of GVS as well as
other participants’ claims about the absence of violence. These diverse views pointed to a
significant range of student experiences with and feelings about GVS along with the
intention to present a positive school image because students perceived their school in this
way and/or desired that we retain that positive perception. The factors listed above led us to
believe there may have been some under-reporting of school violence, but the descriptions of
safety at school were just as important as those of violence, as they provided important
scope for analysis about the factors of protection, satisfaction, joy and learning that operate
in the school. In our analysis of the school environment, student interviews were
triangulated with teacher interviews and participant observation to identify the structural
factors that contribute to the perpetuation of GVS as well as the elements of teacher and
student agency that contribute to feelings of GSS experienced by many students. Narratives of gender safety alongside gender violence indicate that neither exists in isolation from the other, and that to tackle GVS it may be possible to support and enhance the gender safety practices that currently permeate student and teacher experiences and behaviours.

Conclusion

The Draw-Write-Narrate method provided a platform that we hoped would be interesting and exciting to our student participants. It facilitated compelling discussions that enlightened the research, took us in directions we did not anticipate, permitted the project to build upon the existing literature in new ways and identify elements of GSS that are valued by students. The student-centred nature of the approach allowed the participants to first identify their priorities in relation to school and this shaped the direction of the conversation from the outset of the interview. We struggled, however, to interpret and explain opposing statements received in relation to negative elements of school including the prominence of GVS. Working through this necessitated reflection on the importance of leaning into discrepancies in student reports instead of trying to figure out a singular “truth” related to the prevalence of violence and safety. By so doing we created a narrative and analysis that may be messier but we hope is more authentic in its portrayal of the range of experiences, perspectives and emotions among the student population in relation to GVS and GSS. Even in qualitative research, there is a tendency to provide a clear and compelling story about a phenomenon that effectively groups together participants’ voices into categories. This paper outlines the role of triangulation to assist researchers to resist this tendency by identifying possibilities of under-reporting within contradictory descriptions, while still understanding and respecting the values of a range of views within the context of a single space.

Contradictions may arise in many different types of research on sensitive subjects, but may be more pronounced in research with children due to the heightened power discrepancies between the researchers and the participants. These deliberations pointed to the subjectivity of research, both that of the participants’ narratives and our analysis. Subjectivity is present to some degree with all research processes but may be more prominent in ABR with children, where the objective is to explore experiences, opinions and emotions rather than to count occurrences or the percentage of participants who agree with a given statement. Enabling student perspective invites complexity that is at once confusing and enriching, with contradictions as an emergent effect of the diversity of students’ experiences as well as their motivations, doubts, hopes and fears. Researchers should prepare themselves for the likelihood that competing narratives will emerge not only in terms of individual student experiences and interpretations but also in their descriptions of events that took place within their shared spaces in the classroom, school and community. Triangulation is recommended as a critical component of ABR methodology – especially in sensitive research with children. In this study, the combination of method, investigator and data source triangulation proved essential in privileging participants’ common priorities, opportunities and concerns while respecting the diversity that characterize children’s communities and lived experiences.

References


Further reading


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New insights effectively shared: originality and new knowledge in Creative Arts postgraduate degrees

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Abstract

Purpose – The purpose of this paper is to promote narrative inquiry as a legitimate research approach for artists undertaking postgraduate research higher degrees.

Design/methodology/approach – This paper takes the form of a literature review describing practice-led research. It draws heavily on theories of art to support its claims.

Findings – In creative arts postgraduate research degrees, where the thesis is delivered in the form of artifacts and an exegesis, new knowledge and understandings are produced in two fields. In the first of these two fields, new theoretical knowledge detailing the conceptual basis for the creative work may contribute to the understanding of the purpose and nature of art. The second field of new knowledge involves artifacts as they can enlarge knowledge about what the author feel and know through images that illuminate experiences and understandings of life. The development and delivery of these forms of new knowledge occur in an interdependent manner.

Originality/value – The original contribution of this paper is the manner in which artifacts are shown to demonstrate the theoretical knowledge claims articulated in the exegesis. Furthermore, this paper highlights the significance and value of new knowledge and the manner in which this knowledge is effectively shared.

Keywords New knowledge, Research, Art, New insight, Practice-led

Paper type Viewpoint

Introduction

In creative arts postgraduate research degrees, where the thesis is delivered in the form of artifacts and an exegesis, new knowledge and understandings are produced in two fields. The first of these fields concerns the artifacts or original works of art or performance as these can enlarge our knowledge of what we feel and know through images that illuminate new experiences and understandings of life. The second field relates to new theoretical knowledge detailing the conceptual basis for the work that may contribute to our understanding of the purpose and nature of art.

Research is defined in this paper as “a process of investigation leading to new insights, effectively shared” (UK Research Excellence Framework, 2011, p. 45) and “the systematic investigation into and study of materials and sources in order to establish facts and reach new conclusions” (Oxford Dictionary, 2016). New insights, understanding and knowledge developed through a reflexive process of investigation that is effectively shared are fundamental aspects of postgraduate research in the creative arts.

The Australian Department of Education and Training (2016) defines research as:

[…] the creation of new knowledge and/or the use of existing knowledge in a new and creative way so as to generate new concepts, methodologies and understandings. This could include synthesis and analysis of previous research to the extent that it leads to new and creative outcomes. This definition of research is consistent with a “broad notion” of research and experimental development as comprising of creative work undertaken on a systematic basis in order to increase the stock of knowledge, including knowledge of humanity, culture and society, and the use of this stock of knowledge to devise new applications (p. 1).

A key element of these definitions is the systematic development of knowledge, along with the effective sharing or communication of this new knowledge, understanding or insight.
In creative arts research where creative outcomes such as an exhibition or performance and an exegesis are submitted for examination, the creative work plays an important role in demonstrating original practice and providing a form of evidence, by illustrating the conceptual basis of the practice and the theoretical claims made in the exegesis.

The dual form of thesis presentation in a combination of original art, along with the exegesis, coalesce to satisfy the demand for new insights and new knowledge in creative arts postgraduate research degrees. These two fields of endeavor are noted by Gibson (2010), who contends that “Artist-researchers have the chance to woo two modes of knowing: the implicit and the explicit. They have the chance to entwine the insider’s know-how with the outsiders analytical precepts” (p. 11). As a result, creative arts research impacts both artistic and academic domains (Borgdorff, 2011, p. 44).

Whilst all significant works of art demonstrate originality, imaginative significance and a performative capacity by raising questions or unraveling new insights, those associated with postgraduate research require a supplementary written document that communicates the theoretical basis for the practice. The supplementary critical writing or exegesis differentiates postgraduate research in creative arts from the practices of exhibiting artists. This is due to the importance of establishing a conceptual basis for the work and the effective sharing of new theoretical knowledge as this can benefit the researcher and others in the field along with addressing questions regarding the nature of art and practice. As Batty and Berry (2015) argue, “Creative practice research is thus concerned with improving and/or innovating practice, and by doing so also creating new knowledge about practice drawn from an insider’s perspective” (p. 184).

Importantly, visual or performance art must be original to carry the honorific title of “art.” The term original can mean new, however, in the context of creative arts postgraduate research the term original carries considerable weight. The word “original” in this context implies extending the practice and understanding of art in ways, which make a contribution to knowledge. Artifacts submitted for creative arts postgraduate research need to demonstrate significant imagination as well as originality. The extent or significance of the originality of the creative work in a postgraduate submission and its contribution to knowledge in the field is determined through a process of critical assessment and peer review (Earnshaw et al., 2015, p. 509). The ongoing process of determining what constitutes creative arts postgraduate research is constructed through the submission of the candidate, the input from the advisory team and the examiners of the submission (Wilson, 2015).

Practice-led research

The term practice-led research has become the dominant term in creative arts research literature, although the terms “arts-based research”, “artist-informed research”, “studio research” and “performative research” have also been usefully employed (Wilson, 2015, p. 2). Frayling (1993) describes research involving the production of artifacts as research for art, noting that it includes the cognitive tradition in fine art and expressive outcomes (p. 5). The term practice-based is used by Candy (2006) to describe research where practice is the central research activity and “the basis of the contribution to new knowledge” (p. 1). Candy notes that, “whilst the significance and context of the claims are described in words, a full understanding can only be obtained with reference to the creative outcomes” (Candy, 2006).

Frayling (1993) also describes research into art and research through art (p. 5). Research into art includes historical research, aesthetic research and research into social and cultural perspectives, while research through art may involve the study of materials such as pigments, the application of devices, and “where outputs are verified mainly by project work” (Frayling, 1993). Both categories, research into art and research through art, are related to Candy’s description of practice-led research, which “is concerned with the nature of practice and leads to new operational knowledge of practice” (Candy, 2006, p. 1).
Practice-led research “advances knowledge within or about practice” and a “postgraduate thesis can be submitted in a text form without the inclusion of creative work” (Candy, 2006).

While research can be for, into or through, practice-led or practice-based, the term practice-led has become the dominant term in the literature and is now used for research formerly described as practice-based. This paper describes postgraduate submissions, in which artifacts reveal new insights and illuminate the knowledge claims in the written component using the term creative arts research. In such “practice-led” research, the thesis is delivered in both artifacts and the written, theoretical and contextual analysis.

Art and critical writing
There is an important relationship between the originality of the artifacts and the critical writing in creative arts postgraduate research. This relationship can be considered to be symbiotic or interdependent. The originality of the artifacts substantiates and confirms the theoretical written claims. Makela (2007) notes that “creating artifacts is a method for collecting and preserving information, however, artifacts seem unable to pass on their knowledge, which is relevant to the research context” (p. 157). Whilst works of art may be performative, as they can direct thinking, reveal and question aspects of lived experience, works of art cannot deliver the theoretical and contextual reflections that are an integral part of the research journey and that shape our knowledge of art (Makela, 2007). Works of art can demonstrate theories of art but they cannot describe them.

The work of art exodus, shown in Plate 1 illustrates how works of art can substantiate theoretical knowledge claims made in the critical writing. An artist may claim in the critical writing that they are using beauty in a subversive manner in order to engage others in the calamity of coral bleaching and, in so doing, they are extending the understanding of art. The artist exhibits artifacts such as exodus to demonstrate the subversive use of beauty. Therefore, it is the originality of the artifact/s that endorses and shows the value of written knowledge claims.

Notes: Vegetation, beads, acrylic paint. h 88×w 990×d 20 cm

Plate 1. Robyn Glade-Wright Exodus 2014
Without the work/s of art, knowledge claims in the thesis would be speculative and in need of justification. The originality of the artifacts embodies and co-constructs the theoretical reflections that are made available in the critical writing. This interdependent relationship means that the thesis is delivered in both the practical work and the critical writing.

The distinctive value of creative arts postgraduate research
Significant works of art can illuminate our experience, as noted by Graham (2005), who maintains that, “works of art enable us to understand what it is to be human not in the way physiology, psychology or anthropology do, but by providing images through which our experience may be illuminated” (p. 73). In a similar vein, Borgdorff (2011) contends that creative arts research, “is partly concerned with our perceptions, our understanding, our relationships to the world and other people” (p. 45). This cognitive attribute of the arts, where the illumination of experience can lead to new understanding of life suggests that: “the arts must be taken no less seriously than the sciences as modes of discovery, creation and enlargement of knowledge in the broad sense of advancement of understanding” (Goodman, 1968, p. 102). The arts may enlarge our world view as noted in the arts and humanities research council statement: “Arts and humanities research changes the ways in which we see the world – the past world, the present world and the world of the future. It enhances understanding of our times, our capacity and our inheritance” (2013, p. 4).

Meyer (2015) asserts that artists are “borne to be connective fiber and interpreters of humanity; they are often change agents within society because they include as part of their artistic essence their struggle to be heard” (p. 70). The role of revealing insights into humanity transcends the individual as it “is not only ‘what I feel’ that the artist identifies and articulates, but what we feel” (Graham, 2005, p. 43). Therefore the artist “undertakes his work as a public labor on behalf of the community to which he belongs” (Collingwood, 1938, p. 315). A distinctive value of creative arts research resides in its capacity to enlarge what we feel and know through images that illuminate new experiences and understandings of life.

Imaginative significance
Imagination is an important feature of many fields of study and is not confined to the creative arts. Theorist Maxine Greene (1995) contends that the role of imagination “is to awaken, to disclose the ordinarily unseen, unheard and unexpected” (p. 28). While imagination is apparent in many, if not all, fields of research, imaginative capacity is a fundamental requirement in creative arts research as the imaginative treatment of ideas creates significant original work.

Artists who create significant works of art possess both the insight and the imagination to create original, sensual and engaging artifacts. The artist’s insights are conveyed through the artifact in a manner where they can be recreated in the mind of the viewer. Danto (2013) argues that, “Much of contemporary art is hardly aesthetic at all but it has instead the power of meaning” and that the value of contemporary art resides in its cognitive significance and the sensuous manner in which meaning is conveyed (p. 155). Highly regarded works of art are recognized for their veracity, persuasiveness and imaginative significance.

Imaginative significance can be viewed as the degree to which the work moves people, eliciting deliberation, new understanding and creating lasting memories. The words, “illuminating,” “insightful” and “profound” convey the meaning of the term “imaginative significance” (Graham, 2005). As Gibson (2010) proposes, “you know you are encountering art when you are engaging with an intentional process or product that causes surprising transformations in matter or in a moment” (p. 4). The arts are valued for their capacity to illuminate new understandings of life and this is why postgraduate research in creative arts is worthy of a place in educational institutions.
The research journey
Creative arts postgraduate research is complementary to research in fields such as science and technology. In this complementary form of research it can be helpful for candidates to be aware of various ways of working as they suit different purposes. Research in science and technology is “characterized by experimental and analytical processes involving the testing of hypotheses and the determination of conclusions. In general, these are quantitative processes (while) creative arts research often involves qualitative processes” (Earnshaw et al., 2015, p. 509). Table I indicates some differences and similarities between creative arts and science and technology research and these ideas are described below.

Aims and questions: what is to be investigated?
In creative arts postgraduate research, an artist researcher may commence with an instinct or hunch rather than a fully articulated question or hypothesis. Art is associated with working through ideas and revealing the essence of the artist’s perception or concern. The theorist Collingwood (1938) maintains that works of art commence with a “psychic disturbance.” The “psychic disturbance”, described also as a concern, intuition or hunch that instigates a work of art “is gradually identified and refined in the process of creating the work” (Graham, 2005, p. 42). Although it is difficult to write “indefinite” research questions in institutional documents, the nature of the hunch or instinct can be clearly identified as the research commences. Sullivan (2010) suggests creative arts research is “a plausible basis for raising significant life questions” (p. 95). The nature of these significant life questions can take some time to identify. As the theoretical and practical research progresses the essence of the question can emerge. The works of art can reveal the “psychic disturbance” with clarity.

<table>
<thead>
<tr>
<th>Field</th>
<th>Aim/question</th>
<th>Method</th>
<th>Results</th>
<th>Contribution to new insights and knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creative Arts Research</td>
<td>May commence with an intuition or hunch</td>
<td>Unique path drawn in part from an insider’s perspective</td>
<td>Results are presented in the form of artifacts and an exegesis</td>
<td>Thesis is delivered in the artifacts and the text</td>
</tr>
</tbody>
</table>
|                        | A known hunch is explored                                                     | Progresses from a known hunch to an unknown realm of creating work    | A conceptual basis for the work is discovered and articulated           | Contribution to new insights and knowledge of human existence
|                        |                                                                              | Literature, theories and practice inform a reflexive, exploratory process | Artifacts may invite further thinking                                   | Contribution to new knowledge of art and practice                             |
|                        |                                                                              | This activates the imagination to create artifacts and critical writing to arrive at a theoretical basis for the work | As artifacts are original, validation is not possible by others repeating them |                                                                                 |
| Science and Technology Research | May commence with a hunch and/or may be imagined but research will only process if it will fill a gap in existing knowledge | Mitigates against researcher bias                                       | Results are definitive and usually text based                         | Thesis is delivered in text                                                  |
|                        | The unknown is tested                                                        | Progresses from the unknown towards the known mainly through established, repeatable quantitative research methods | Results should be repeatable by other researchers                       | Contribution to new knowledge in the field                                    |

Table I.
Research in the creative arts and science/technology: some differences and similarities
In creative arts postgraduate research, the topic to be investigated is rarely initiated by a gap in the literature. Instead, the research is largely a response by the particular artist to a personal inner journey, developed through contextual and theoretical research in the field. For example, there is no gap in the literature suggesting a requirement for creative arts research regarding plant extinction. An artist who chooses to pursue creative arts research focusing on plant extinction is responding to their instinct, hunch, longing or intuition rather than addressing a gap in the literature. In this case, plant extinction enabled the artist to communicate her desire to protect and nurture the world.

By contrast, research in science and technology may commence with an intuition or hunch, involving imagination, however, the research will only progress if an absence in existing knowledge or a gap in the literature is identified. Researchers in Science and Technology review the literature to discover if an idea has been investigated to identify a gap in existing knowledge. The research question and/or hypothesis are formulated to generate an answer to bridge the gap. It is clear that research has taken place when the hypothesis is tested, or the question is answered.

In the field of Science and Technology research, it would make little sense for two students to undertake the same study, beyond a test for verification. By contrast, in creative arts research, it is possible for two artists to research the same topic. For example, if the well-known Australian landscape painters John Olsen and Fred Williams produced and exhibited a body of work along with an exegesis describing the conceptual basis that underpins their landscape painting practice, both artists would be creating original research, even though their topic, “landscape painting” is the same. As each artist works from an insider’s perspective, his paintings would reveal a unique vision (Batty and Berry, 2015). Each artist would describe a different theoretical basis for his practice as this responds to his original vision. Therefore, in creative arts research, two artists can research the same topic and deliver original insights and new knowledge of art that may contribute to their own and others practice and extend our understanding of the world in which we live.

Results produced during science and technology research can be verified by repeating the test. In creative arts it is not possible to verify the creativity of an artifact through replication as works of art are original entities that are created through an act of imagination. Imagination is not required when a work of art is replicated. Therefore, an artifact cannot be made by a second person as a test for the validity of the imaginative treatment of the ideas.

Typically, research in the Sciences transits from the unknown (hypothesis) to the known (results) (Willison and O'Regan, 2007, p. 395). By contrast, creative arts research may commence with a known instinct or hunch and progress through an experimental unknown realm of reflexive creative practice. In a reflexive process, literature about theories of art and the context of the art informs practice. In turn the practice informs the establishment of a conceptual basis for the work, which informs theory. In this nexus, theory contributes to practice and practice contributes to new theory. Reflections of practice and theory combine to reveal new known understandings of practice and theory.

Artists may use known facts such as the demise of a coral reef due to coral bleaching. The work of art itself is not presenting new knowledge regarding coral bleaching; however, the artifact demonstrates originality in the manner in which the facts are imagined, specifically refigured and given an aesthetic force. Therefore, it is the quality of the imaginative portrayal of known facts that is significant in artifacts created for postgraduate creative arts research.

Artists may also suggest ideas in artifacts that are neither true nor known. For example, Barbara Dover’s poetic piece, “And No Birds Sing”, presents a chilling, imaginary world, devoid of birds. This fictitious world invites us to consider perspectives we may not have imagined. It is the quality and effectiveness of the imaginative treatment of ideas, known or
unknown, which distinguishes strong works of art from others. Therefore, the imaginative treatment of new insights is an important feature in artifacts submitted for postgraduate examinations (Plates 2 and 3).

**Method: the reflexive process**

A systematic reflexive process or method is required to delve deeply into the subject in order to find the answer that is the basis for a creative work (Blass *et al.*, 2012). "Reflecting" describes conscious consideration of information and practice and a "reflexive action" means altering what is produced as result of reflection. This systematic reflexive process involves thoughtful analysis, writing, creating, critical reflection and reflexive action. This process is repeated many times in various sequences throughout the creative arts research journey. The reflexive and transformative nature of creative arts postgraduate research is described as one that is "recursive and constantly undergoes change as new
experiences ‘talk back’ through the process of making art in research settings” (Sullivan, 2010, p. 110). The reflexive process has been described as “erratic” and “messy”, with productive euphoric moments along with sidetracks that do not work out and require one to back track to find another arena for exploration (Borgdorff, 2011). Figure 1 illustrates the reflective process of creative arts research.

Creative arts postgraduate candidates identify theories of art that resonate with their work as these theories enable candidates to justify the claim that their work is a current example of contemporary arts practice. A review of the work of other artists or
“precedents of practice” provides a further context for the practical research. The critical writing should provide meaningful and thoughtful reflections about the aims, processes and ideas that have been interrogated to identify and resolve the demands of the practice and the conceptual basis for work.

Results
When an artist-researcher delves deeply into a topic and finds a conceptual basis that underpins their practice, and when this answer is communicated, “in a manner that can contribute to the practice of others” and to themselves, then one can see that creative arts research is occurring (Blass et al., 2012, p. 37).

Artifacts produced for creative arts postgraduate research are frequently exhibited in public galleries. These artifacts may perform a social function by inviting viewers to consider “fundamentally unfinished thinking, and prompt us towards a critical perspective” (Borgdorff, 2011, p. 47). When artist’s insights are imaginatively rendered in the sensuous form of an artifact, their practical work can raise issues or reveal insights that lead to a greater understanding of lived experience or new ways to view the world. Art is not “real life,” however, it has the possibility of truth, and relates to real life and therefore may enrich it or disturb it (Graham, 2005).

Contribution to knowledge
In creative arts postgraduate research, new knowledge of practice may be of benefit to candidates and others in the field when it is effectively shared. Effective communication of the theoretical basis for the work extends, in a cognitive sense, our understanding of the nature and purpose of art.

Artifacts exhibited for examination in postgraduate research may elicit reflection, revealing insightful and useful perceptions that enable us to tarry with the important questions of life or gain understandings about people, circumstances and relationships from a new perspective.

Conclusion
Creative arts doctoral research may begin with an intuition or hunch and progress in a unique, reflexive, explorative manner where theories inform practice and practice informs theory. This reflexive research method enables insights, gleaned from contextual, theoretical and practical work, to be imagined and rendered in both the works of art and in the critical writing. The thesis in creative arts postgraduate research is presented in the dual form of the artifacts and in the critical writing. The artifacts provide confirmation of written knowledge claims and may present new insights in a sensuous form that raise significant questions or illuminate experiences and circumstances. The works of art can generate a transformation of understanding that would be difficult to deliver in any other form. The critical writing can deliver information about the conceptual basis of the work that the works of art cannot describe. When new insights are effectively shared through the process of creative arts postgraduate research, our understanding and knowledge of humanity and art can be enhanced. We may also be moved to further contemplation of life.

References
Abstract

Purpose – The purpose of this paper is to show the research process which is laid on the interrelated aspects of paradigm-research-based approaches and research designs.

Design/methodology/approach – It draws on my PhD research project experience, where I deployed these interrelated aspects informing my methodological perspective to produce quality research via the generation of legitimate research findings.

Findings – From this practice, my chosen held paradigm, constructionism, has guided me to proceed with my research process, leading to the selection of a research approach (qualitative case study) and research designs (interviews, observation, and document analysis).

Originality/value – This conduct helps valorise the legitimacy of my research findings to produce legitimate knowledge. This reflective account of the research process can become a lesson for others who wish to go through a legitimate process of selecting the research approaches and research designs, particularly, in social sciences.

Keywords Case study, Research designs, Paradigms, Qualitative, Research approaches, Constructionism

Paper type Viewpoint

Introduction

How can an inquirer persuade his or her audiences that the research findings of an inquiry are worth paying attention to? (Lincoln and Guba, 1985, p. 290).

The question posed by Lincoln and Guba (1985) above inspired me to write my methodology, and accordingly acted as my point of departure to demonstrate the quality of my research which was highlighted in the research process in terms of the tying of specific theories, and paradigms (Denzin and Lincoln, 1994; Maxwell, 2005; Creswell, 2008).

In elaborating the methodological perspectives which will inform and guide my research, I was basically influenced by the four elements of research process proffered by Crotty (1998). Those elements are “epistemology”, “theoretical perspective” (philosophical stance or ontology), “methodology”, and “method”. In this way, it was important to provide a clear process (research process) in how I chose the philosophical stance or paradigm that informed the choice of methodology and method (how I proceeded with the research procedures). Arguably, this process of research, indeed, is assumed to have impacts on the strength of research designs which at the end contribute to the production of legitimate knowledge – thus leading to a contribution to the related literature (Denzin and Lincoln, 1994; Crotty, 1998; Creswell, 2008).

To be specific, the purpose of elucidating and identifying the components and phases of the process in carrying out the research is to provide a model for reflection and identification of the paradigm and methodology used in education research exercise that could be adopted in some forms by others undertaking PhD studies. Those phases encompassed selecting the analytic devices to analyse qualitative data; factors influencing me in the course of selecting the appropriate epistemology, theoretical perspective, methodology, and method; and how these four interwoven elements of research process shaped my ways in analysing the data.
To strengthen the trustworthiness of the chosen methodology and method, previous empirical research drawn from the relevant literature was presented along with an audit trail pertinent to the transparency and credibility of the research process (Tracy, 2010).

To do so, this paper is divided into six sections. The first section is concerned with the research process on choosing the appropriate interrelated methodology, method, theoretical perspective, and epistemology. In this way, an intertwined hierarchical relationship of these four elements was elaborated to demonstrate a clear picture of how they inform one another, and the reasons to choose each of the chosen elements. The second section refers to the methodology which describes the plans and actions of this research and the guiding philosophical stance embedded in it. The third section deals with the procedures and techniques to carry out the research. The second and third sections also serve as the “audit trail” as they are referred to the transparency and credibility of the research process. By doing so, the issues pertinent to subjectivity or bias, reliability, and validity of my research can be evidently addressed and overcome. The fourth section deals with the role of theory, and the fifth and sixth sections proceed with the ethical consideration and the issues of reliability and validity, respectively.

The research process

There are many styles or variants in qualitative research, such as survey, case study, ethnography, and experiment (Lincoln and Guba, 1985; Robson, 1993; Silverman, 2011). These styles of research have their own purposes, foci, paradigms, and approaches in studying the phenomena (Cohen et al., 2011). Due to the nature of these styles, scholars have proposed ways to plan and execute qualitative studies. Cohen et al. (2011), Maxwell (2005), and Denzin and Lincoln (1994) argued that defining the specific purpose of research constitutes the ground to begin to design qualitative research.

Bearing this in mind, as a starting point, I began my research process by determining the research purpose and intention to bridge to appropriately select the sort of methodology and method I embarked on. The purpose of my research is to provide a rich description, explanation, and understanding of the experiences, and actions of academics in their subjectivity or in their own context or through the “emic” perspective – and the meanings they gave to the government-driven change processes or reforms on higher education in Indonesia, embodied in the effectuation of the Higher Education Act (2012). Such reforms have been organised within the notion of the economisation of higher education in the economy and knowledge society brought forth by the advent of neoliberalism. The agenda of neoliberalism is implicitly identified in the Higher Education Act (2012). The reforms have just gone into effect recently (Higher Education Act, 2012) in all universities across Indonesia and have been assumed to be a contemporary phenomenon occurring in Indonesian university contexts. Referring to this supposition, I decided to choose a case study as the methodology (Stake, 1995; Bassey, 1999; Yin, 2009). Then, from the chosen methodology, I planned what instruments I used to collect data to answer the research questions.

In view of the research questions, it can be concluded that they are the “how” questions which are explicitly suited to explore in qualitative research, rather than quantitative research (Merriam, 1998; Yin, 2009). There are main methods for data collection in naturalistic inquiry, which fit with this type of question, they are participant observations, interviews and conversations, documents and field notes, accounts, and notes and memos (Hammersley and Atkinson, 1983; Robson, 1993; Cohen et al., 2011). For my research, I selected to apply three instruments for collecting data, such as interviews, observations, and document analysis.

So far, I have identified the methodology and the method to use. However, choosing the methodology and the method for my research is not merely an action of aligning them with research questions; rather it transcends the boundary of my assumption about the reality
I brought into my research. It is the way we look at our world and make sense of it (Denzin and Lincoln, 1994; Crotty, 1998). This has something to do with the philosophical stance that lies behind this chosen methodology, used for the justification of the chosen methodology. Crotty (1998) called “theoretical perspectives” or “ontology” as called by Denzin and Lincoln (1994). The theoretical perspectives are an assumption of “what human knowledge is, what it entails, and what characteristics do we believe that knowledge to have” (p. 2), while ontology is related to the question of “what is the form and nature of reality and, therefore, what is there that can be known about it?” (Denzin and Lincoln, 1994, p. 108). A combination of epistemology, theoretical perspectives or ontology and methodology makes up the construct of a paradigm. The paradigm is “a set of basic belief system (or metaphysics) that deals with ultimates or first principles” (Denzin and Lincoln, 1994, p. 107). Before providing my chosen theoretical perspective that informed my chosen methodology, it would be immensely useful at the outset to understand the varieties of interpretive research to know its underlying assumptions in viewing the world.

Cohen et al. (2011) provided us with two general kinds of terminology used in distinguishing between the positivist and the subjectivist approach to research. The first was represented with the “normative” and the latter was represented with “interpretive” terminology. I will only focus on the latter in relation to my research. One important issue in understanding the interpretive school of thought is to come to know its underlying principles in viewing the world or phenomena being investigated. In this case, interpretivists view the phenomena being studied as subjective to human experiences. Therefore, in order to come to understand human experiences, efforts are made to get inside their world and understand them from within (Cohen et al., 2011). Therefore, knowledge or reality is not out there, but in here in the subjective experiences or minds of participants (Hatch, 1997a).

There are wide varieties of interpretive research, ranging from phenomenology, ethnomethodology, and symbolic interactionism (Cohen et al., 2011; Silverman, 2011). These are the study of human beings’ experiences but they are embedded with different ideologies to study lived experiences of human beings. Phenomenology, for example, focusses on the description of people being studied at face value ignoring the external and objective realities described (Cohen et al., 2011). Ethnomethodology is the study of methods people use for constructing reality in everyday life. Unlike phenomenology, this approach is very much concerned with how social realities are constructed in social interactions (Silverman, 2011). The ethnomethodological approach is very much similar to the symbolic interactionism in that the social world is constructed through social interactions through the use of symbol (language) to attribute meanings to object. Through the use of language, people come to share the same meaning and understanding in their social interactions (Mead, 1934; cited in Beatty, 2002). In this way, the “I” and “me” intermingle to create common understandings in their social interactions. The “I” is the personal individual within a given society or organisations, which he/she interacts with the “me” as other individual in the same given society. The “I” and the “me” then develop interactions to understand each other through the use of symbol (language) attributed to objects. Thus, they can understand each other through the process of meaning making to create their culture. Symbolic interactionism is embedded in constructionism where the world or knowledge is developed and transmitted through interactive human community or through the significant others.

My study is based on a constructivist epistemology, where epistemology is “a way of understanding and explaining how we know what we know” (Crotty, 1998, p. 3). The constructivist epistemological position is that truth or knowledge is not separated from human beings, rather it is integrated into the social context through which knowledge is co-constructed. In adopting this epistemological premise, the theoretical perspective adopted
in the study is that an exploration of a social phenomenon requires a study of lived experiences of people through an understanding of their social world. This generates an interpretation. These theoretical perspectives could be referred to as interpretivism.

Taken together, these three research elements work like this. For example, a researcher’s choice of the epistemology is the constructivism; the theoretical perspective he or she applies could be the interpretivism. Interpretivism associates its concept with Weber’s concept of “Verstehen” which means understanding something in its context (Denzin and Lincoln, 1994; Crotty, 1998). Researchers working in this theoretical perspective will study the phenomena through analysing the meanings participants associate with them (Denzin and Lincoln, 1994). This theoretical perspective will be implicit in the research questions and guide the methodology or plan of research and analysis of data. The research questions then dictate the method of data collection and analysis (Yin, 2009).

The hierarchical description in Figures 1 and 2 gives an easy understanding of the relationships of these four elements of the research process in my research, and how they inform one another.

According to Denzin and Lincoln (1994), researchers who decide to work within the vein of constructivists are relativist, transactional, and subjectivist. The relativist stance holds an assumption that “there is no objective truth to be known” (p. 54) and emphasises on the diversity of interpretations that can be applied to the world on account of the subjective experience of the respondents. Crotty (1998) did not apply the term of ontology to his paradigm as opposed to Denzin and Lincoln (1994), rather introduced the term of theoretical perspective that is informed by and embedded in the epistemology.
The methodology

My chosen methodology is the case study. My methodology to explore the issue raised in my research is drawn from the research questions, the specific purpose of my research, and the epistemology and ontology that I adopt (constructivism and interpretivism).

The purpose of my study was to provide in-depth and rich descriptions, explorations, and understandings of the reform process in higher education systems in Indonesia resulting from the enactment of economic-driven policy (The Higher Education Act, 2012) set up by the Indonesian Government. To explore this process deeply, the formulation of three research questions using “how” and “what” were put forward. These types of questions helped me both provide a descriptive and an exploratory interpretation of the phenomena being studied through social interactions, experiences, and actions of Indonesian academics and how they gave meaning to this change process. To this extent, it required me to closely pay attention to the context in which these elements took place. From the interpretivism perspective, there appeared to be an array of methodologies that can be used to study human experiences. Among these, the case study approach is deemed to be suitable to guide to establish techniques and procedures to proceed with my research, because the study of the change process in Indonesian higher education poses a contemporary phenomenon and cannot be separated from its context. The case study approach is considered as an ideal approach when we want to understand holistically “a contemporary phenomenon (e.g. a ‘case’), set within its real-world context – especially when the boundaries between phenomenon and context are not clearly evident” (Yin, 2009, p. 18).

The context and phenomenon have become inseparable components in a case study. The context provides a medium to better and deeply understand the case or the contemporary phenomenon in particular (Yin, 2009). The closeness of examination of these interrelated elements in their natural settings is aimed at producing deep understandings and the appreciation of the case(s). In addition to the context itself to understand the contemporary phenomenon, there are other complex conditions embedded in determining the understanding of the cases being studied. With this caveat comes the expectation of extracting a new learning about a real-world behaviour and its meaning (Yin, 2009).

In view of this caveat, my desire to get deep understandings about the contemporary phenomenon or the case about the implication of the implementation of higher education reform embodied in the enactment of the Higher Education Act (2012) to elevate the economic competitiveness of Indonesia. This policy imperative enactment required me to collect data from academic communities through several sources of data in the three universities to understand deeply the impacts or implications of this policy for their academic identity and their institutions. The inclusion of this practice made my case study to have a nested unit (embedded subcases) within the main unit (Yin, 2009). To gain invaluable and deep understandings about the case, I examined the context in which this phenomenon took place. To do so, understanding the context about the Indonesian higher education and economic current condition and
development was highly important. Considering all the above facts, I concluded that my case study was classified as the embedded multiple-case study, where the boundaries between the case and its context were blurred.

Figure 3 provides a clear picture about the vagueness or opaqueness of the boundaries between the phenomenon being studied and its context. The dashed line demonstrates the blurred boundaries between the case and its context (Yin, 2009).

The multiple-case study is substantially important to increase the robustness of the methodology and to enable the generation of theory (Miles and Huberman, 1994; Yin, 2009). In addition, for my research, the multiple-case study can cover the questions of “how” or descriptive and exploratory interpretations of the research findings through the comparison of cases in light of the implementation of the policy and academics responses to this.

After defining the case or unit analysis of my research, I turned to other important factor of self-reflexivity in relation to the positionality (Louis and Barton, 2002) in this research. This is important to address a potential “bias” in interpreting the data resulted from my first-hand knowledge about the situation and context where my research was carried out. Research in the research was carried out in three state universities in three different cities in Indonesia. Two out of these three universities (The University of Mawar and Anggrek) were perfectly unknown territory to me. Accordingly, this constraining condition forced me to apply techniques in order to gain an in-depth understanding about participants’ thoughts and behaviour grounded in their own context or real life. This can be achieved through a prolonged immersion and close interaction into their contexts, being as a native (Geertz, 1973). In this way, it is expected that the “emic” interpretation of the observed behaviours and thoughts can be accomplished.

This situation directly contributed as well to define my positionality (Louis and Barton, 2002) as a researcher. My positionality, subsequently, is categorised as an outsider researcher “etic” (Stake, 1995; Salmons, 2010). I, as the outsider because I was detached from them, serving as the outside onlooker who brought in questions in order to explore problems in my research questions (Salmons, 2010).

Figure 3. Embedded multiple-case study

Source: Cosmos Corporation (cited in Yin, 2009)
In one university (Melati) which is well known to me, my positionality as an insider researcher is basically built upon our membership as university staff. This situation may have implication on the assumption I make in the interpretation process of observed events in the institutions, even though in interpretive research it is acknowledged that the subjectivity and the phenomenon being studied are intertwined and inseparable elements (Denzin and Lincoln, 1994; Bryman, 2012). The position as a researcher is important to conduct in a qualitative research (Louis and Barton, 2002; Salmons, 2010). The choice of the position as whether we as an outsider or as an insider would affect the trustworthiness of our research, particularly related to the problem of bias of our findings, due to the influences of our values, experiences, perceptions, and meanings may intervene our interpretations in the data (Louis and Barton, 2002; Salmons, 2010). However, the choice of the philosophical stance may help negotiate this problem (Maxwell, 2005; Creswell, 2008).

Given the aforesaid issues, therefore, the methodology that is appropriate to apply is the case study approach with interviews, observations, and document analysis as instruments to collect data.

**Methods of data collection**

As mentioned above, I used three instruments to collect data as a triangulation. These three instruments are useful to strengthen the validity of the data obtained. Therefore, I cannot rely only on the participants’ perceptions and take them as the truth evidence of their academic world.

**Sampling procedures**

Sampling procedures to choose multiple cases in this study were the concerted applications of both the premise of a “replication logic” (Yin, 2009), and a “purposeful sampling cluster case framework” (Patton, 1990). The replication logic consists of a literal and theoretical replication. The literal replication is concerned with the selection of cases from similar settings to produce similar results, while the theoretical replication is used to select cases that have different settings to obtain different results (Yin, 2009). While the replication logic with its two approaches as mentioned above does not methodologically provide guidance for a multiple-case selection, the “three-cluster case framework” developed from the 16 purposeful samplings and purposeful sampling strategies proffered by Patton (1990) was utilised for the sampling.

The three general cluster case frameworks developed by Patton (1990) are significant vs ordinary case cluster, different vs similar case cluster, and predetermined vs ad hoc case cluster. These three purposeful samplings have purposeful sampling strategies to select multiple cases (Patton, 1990; Sakir, 2002). Table I illustrates these three cluster frameworks (Patton, 1990; Sakir, 2002).

Referring back to the purpose of my research as elaborated earlier (to gain an in-depth and rich description, exploration, and understanding of reform process in the Indonesian higher education system), my sampling procedures cut across diverse and similar characteristics of groups involved. With regard to this, the case selection was grounded on the combination of the purposeful ordinary case sampling with typical case sampling strategy, and the purposeful maximum variation sampling with stratified purposeful sampling strategy. Although the maximum variation sampling can be problematic, particularly in a small sample with high heterogeneous characteristics of cases, this sampling strategy, though can increase the strength of the results, as Patton (1990) argued “any common patterns that emerge from great variation are of particular interest and value in capturing the core experiences and central, shared aspects or impacts of a program” (p. 172). Therefore, I decided to use this sampling procedure to recruit a small sample in each
university. In addition, the selection of the small sample is in line with the purpose of my research which is to gain the depth of the research findings (Patton, 1990).

Because my research purpose was also exploratory in nature and adopted a multiple-case study approach, the typical or ordinary case is considered appropriated to describe “what is typical” (Patton, 1990, p. 173) in the process of reform in Indonesian higher education systems. The second sampling strategy addressed the issue of maximum variation for the purpose of obtaining “a wide range of variation on dimensions of interest” (Patton, 1990, p. 182).

The maximum variation sampling was appropriated in my study to select universities in Indonesia to investigate the implementation and implication of higher education reform that has gone into effect in 2012 to all Indonesian universities across Indonesia. Considering that the Indonesian universities spread across the archipelago with different characteristics and classifications based on research performance as determined by the Directorate General of Higher Education (DGHE) (2012), the issue of geographical and classification representation can be overcome with this sampling strategy. With regard to this, three state universities from different parts or islands in Indonesia, representing three geographical regions (the Western, the Central, and the Eastern regions) were selected to take part in this study based on the classification of university types taken from the DGHE (2012). On the basis of the research performance, universities in Indonesia are classified into four clusters (independent, main, middle, and nurtured clusters). Independent clusters are those associated with research universities, and the main, the middle, and the nurtured clusters are associated with non-research universities. With the stratified sampling strategy, I selected three universities in three clusters to represent the types of universities. Through the stratified sampling strategy as well, I set the criterion of only those universities that perform good or better research performance were included. Therefore, indeed, the nurtured clusters of universities, which were categorised as poor research performance, were opted out. From stratifying the performance of universities in research, subsequently, one independent research (The University of Mawar), one main non-research university (The University of Anggrek), and one middle non-research university (The University of Melati) were chosen. The purpose of a stratified purposeful sampling is “to capture major variations, or to produce theoretical replication (Yin, 2009), rather than to identify a common core, although the latter may also emerge in the analysis” (Patton, 1990, p. 174). The use of pseudonyms to denote the universities was intended to preserve the anonymity
of universities under study. Further maximum variation sampling was applied to locate the embedded units in each university. Referring to Becher (1994) who argued that academics are affected by their epistemological stance in perceiving their work and the nature of their work, the selection of embedded units was grounded on the two different disciplines which represent the “soft” and the “hard science”. In this case, the Language and Literature/ cultural studies and the Engineering Faculty were selected.

The selection of participants in each university was carried out differently from those of university selections. The purposeful sampling undertaken was the “fieldwork determined cases with the snowball purposeful sampling strategy” in order to locate information-rich cases (Patton, 1990). In this way, my endeavour was to seek respondents who know a lot about the reform process in their universities through the information of other participants in the field. Through other participants’ information, the participants partaking in my research got bigger and bigger. On the basis of this sampling, 30 academics from two different disciplines (the Engineering Faculty and the Language and Literature or Cultural Studies Faculty) and from three state universities participated in this research assuming different kinds of roles. In total, 12 respondents are women aged between 39 and 62 years and the other 18 are men aged between 40 and 63 years. All female respondents are teaching staff, while three of the male participants are the heads of department and the other three are the deans of the faculty within three universities under study. The remaining 12 of the male respondents are also teaching staff. The Language and Literature Faculty in the University of Melati and Cultural Studies Faculty in the Universities of Mawar and Anggrek are the same disciplines, only universities under this study have used different names. To denote these two disciplines, abbreviations were applied, namely, the “Eng” to refer to the Engineering Faculty, the “Lit” and “Cult” to denote The Language and Literature Faculty and the Cultural Studies Faculty, respectively.

Theoretical framework
The role of theory in the case study research is pivotal and this makes it different from other research methods, such as ethnography and grounded theory (Yin, 2009). The theory is an explanation of the phenomena being studied. The theory can be drawn from a different field of studies of disciplines, such as anthropology, psychology, linguistics, organisational theory, and so on. The theoretical framework in research serves as a lens to study the phenomena. It helps to stretch ones’ mind into understanding of the story about what is going on in organisations being investigated (Anfara and Mertz, 2006). Maxwell (2005) defined the theoretical framework as “the system of concepts, assumptions, expectations, beliefs, and theories that supports and informs your research” (p. 33).

For case study researchers, Yin (2009) recommended to conduct an initial theory building, prior to entering the field to collect data. The theory development is essential to provide a theoretical supposition or hypothetical theory about why the events, acts, and thoughts occur. Thus, this helps pave clear clues and paths to “explore what is to be explored, the purpose of the exploration, and the criteria by which the exploration will be judged successful” (Yin, 2009, p. 37). With regard to this, I built my hypothetical theories as follows:

The case study will demonstrate what changes taking place when the economic language of neoliberalism is represented in the reforms on higher education, and why such reforms have bad implications for academics or professional identity of academic communities (Olssen and Peters, 2005).

When this practice is taken, the policy implementation is best practised within rational process of scientific management, and why this scientific process gained resistance from professional communities (Olssen and Peters, 2005; Lorenz, 2012).
Drawing upon this, I then adopted neoliberalism theory, the neo-Weberian state model, academic identity, and resistance theory. With these multifaceted theories I proposed would contribute to the soundness of the face and content validity (Tracy, 2010) of my research.

**Ethical considerations**

Ethics in research is germane to the judgement in light of the rightness, appropriateness, and wrongness of actions applied in the whole research processes (Miles and Huberman, 1994; Tracy, 2010). Due to the nature of interpretivism research which is to explore and understand the social world of the phenomenon being studied in which close relationship and engagement must inevitably be built, the issue of ethics plays a vital role to protect and prevent people from any harm arising from the relationship between the researchers and participants (Miles and Huberman, 1994; Tracy, 2010; Hammersley and Traianou, 2012).

To mediate the exploration and understanding of the social world of the participants, researchers usually use a set of data instruments to collect data, i.e. interviews, observations, and document analysis. These sets of instruments are directed at obtaining a rich and deep exploration and understanding of the human social world where direct involvements and close relationships in the context in which the phenomena being studied are needed (Miles and Huberman, 1994; Bryman, 2012; Hammersley and Traianou, 2012).

However, qualitative data collection and analysis are not simply a technical matter of building close relationships with the participants in natural settings and of seeking the quality of knowledge, but there are more than that need to be fully taken into consideration – particularly in terms of how these conducts are ethically performed. As noted by Miles and Huberman (1994):

> Qualitative data analysis is more than a technical matter. We cannot focus only on the quality of the knowledge we are producing, as if its truth were all that counts. We must also consider the rightness or wrongness of our actions as qualitative researchers in relation to the people whose lives we are studying, to our colleagues, and to those who sponsor our work (Miles and Huberman, 1994, p. 288).

In addressing about ethics in the research process, some prominent scholars have proposed the theory of ethics. One of them is Flinders (1992), who developed four frameworks of ethical theories: utilitarian perspectives, deontological perspectives, relational perspectives, and ecological perspectives. The utilitarian perspectives are closely related to procedural ethics (Tracy, 2010), which deals with the issue of procedures undertaken in the fieldwork in relation to the participants’ recruitments. The basic tenet that governs the recruitment of participants is highly grounded on the protection of participants from any harms, protection of confidentiality, and protection of the rights of participants to voluntarily participate in research (Flinders, 1992; Miles and Huberman, 1994; Tracy, 2010). The deontological perspectives, on the other hand, emphasise the reciprocal relationship between researchers and the researched in the process of recruitment which takes the form of avoidance of wrongness, and of fairness in the reporting process in the first place. Within the relational perspectives, the process of recruitment of participants is vested on the principle of collaboration in terms of an equal position between researchers and the researched (Miles and Huberman, 1994; Tracy, 2010). The ecological perspectives are closely concerned with the cultural sensitivity in the context of the phenomenon being studied (Miles and Huberman, 1994; Tracy, 2010).

While Flinders offered four ethical procedures in conducting research, Tracy (2010), on the other hand, proposed three sorts of ethical procedures: they are procedural ethics (similar to utilitarian), situational ethics (respecting the context of research), and exiting ethics (informing participants on the way data will be handled upon leaving the research sites). I was interested to deploy Tracy’s forms of ethics to explain the ethical procedures undertaken in the process of my research.
On the basis of Tracy’s (2010) ethical procedures, I framed my research ethical procedures as follows:

(1) Procedural ethics:
- Permissions were sought from the authority in each university prior to conducting data collection.
- The respondents were made available about all information related to this research through a participant information sheet. This sheet contained information about the purpose of the research; the nature of respondents’ participation which was highly on the basis of voluntariness; their right to withdraw at any time during the ongoing research activities without providing any reasons and without any harms their right to know any likely risks arose from their participation; the right to know how data will be handled, analysed, and destroyed; and the right to decide whether to participate in the research or not through the signed inform consent.
- The nature and procedures of the research were reiterated in each interview.

(2) Situational ethics:
- During data collection in each university, I made attempt to not interrupt the daily activities of the university.
- Moreover, I made efforts to respect the culture held by each university and adapted my manner to that culture.

(3) Exiting ethics:
- Upon leaving the research site, I informed participants about how the data collected and their privacy will be handled.
- To preserve anonymity of both the respondents and their institutions, the use of pseudonyms was applied.
- To ensure confidentiality, all data obtained were strictly protected both in a private password-protected laptop and university computers. The data were only accessed by me and my supervisors. The data will be destroyed after five years.
- To ensure transparency of the research process, the audit trail was undertaken and presented in a detailed explanation, encompassing all processes that had been gone through during the research process.

Reliability and validity
Reliability is closely related to the notion of “replicability” or the consistency of research findings (Miles and Huberman, 1994; Babbie, 2003). There are two types of reliability: they are internal and external reliability (Miles and Huberman, 1994; Babbie, 2003). The internal reliability is concerned with the extent to which two or more researchers using particular methods and instruments on studying the same phenomenon can produce the same results or findings in different contexts (Babbie, 2003; Bryman, 2012). The external reliability refers to the extent to which a researcher can replicate the findings of another, using the same methods and conditions at different times and conditions.

In qualitative research, this issue is problematic as reality or human behaviours are changeable. Denzin and Lincoln (1994) used “dependability” instead of reliability to show the quality of qualitative research, especially those who work in the interpretive and constructionist paradigm. The researchers discern reality as changeable. Therefore, results
can vary in line with the changing context (Blanche and Durheim, 1999). The most important thing in the interpretive and constructionist framework is the detailed and rich descriptions of the context in order to convince readers that such an event really occurs in reality.

Because meaning or truth is socially constructed and consensually validated, meaning or truth is relative. Relative means that reality is temporary. It can change through time and place, “never absolute across time and space, this reluctance to generalise and the suspicion of generalisations asserted by others” (Patton, 2002, p. 100). Interpretivism provides a deep and detailed description of the context in order to give meaning. With a case study the case is an object of interest in its own right, and the researcher aims to provide an in-depth elucidation of it. “Measurement validity, internal validity, external validity, reliability, ecological validity, and replicability depends in large part on how far the researcher feels that these are appropriate for the evaluation of the case study research” (Bryman, 2012, p. 69). What is more pivotal in my case study is the relatability (Bassey, 1999), which emphasises the ability of my research findings to invite judgement from readers, so that the reader could relate them to her own situation.

Validity refers to the accuracy of the research findings. As with reliability, validity likewise consists of two types, internal and external validity. The internal validity refers to the extent to which the findings are able to be interpreted accurately (Bryman, 2012). The external validity deals with the extent to which the results of the research are able to be generalisable (Bryman, 2012). Again, the issue of validity in interpretive study is also problematic because the subjective nature of this research, where the researchers are the primary instruments to collect and analyse data.

Apart from this, my research has a sound internal validity because it utilised multiple sources of data collection (interviews, observations, and official document analysis). In addition, the case selection in which this research was conducted required me to spend much time in investigating the appropriate case. Furthermore, I was involved in a long immersion with the faculties to collect data through interviews, observations, and to gather official documents. The internal validity of this research was strengthened as well from interviewing multiple sources of people and triangulating their stories or triangulation within the case (Stake, 1995).

As for the external validity of this research, it was informed within the norm of social constructivist paradigm which embraces the interpretivist method in interpreting human experiences. The interpretive method is a method that tries to describe and interpret people’s feelings and experiences (Blanche and Durheim, 1999, p. 123). To ensure the external validity of my research, I provided rich and thick descriptions and the interpretive method is an ideal tool in providing such descriptions (Denzin and Lincoln, 1994).

The issue of validity in qualitative research has been a subject of debate among scholars. The key area of debate has been on the matter of how knowledge is obtained in order to yield a legitimate knowledge. The proponent of the qualitative research tries to respond to this issue by providing the criteria or strategies to determine the trustworthiness of the research. Denzin and Lincoln (1994), for example, put forward four components in addressing the validity of qualitative research. Those four elements are “credibility” which parallels with internal validity, “transferability” which parallels with external validity, “dependability” which parallels with reliability, and “confirmability” which parallels with objectivity (in Bryman, 2012, p. 390). Internal validity can be achieved by using a “triangulation” which consists of four types, i.e. multiple investigators, multiple theories, multiple sources of data, and multiple methods to confirm the emerging findings. External validity refers to generalisability which can be attained through rich and thick descriptions (Merriam, 1998). My research is squarely placed within the paradigm of constructionism which holds an assumption that the knowledge or truth is co-constructed by the researchers and the participants. Therefore, knowledge or truth is subjective construction of subjective experiences from the
respondents through their association of meanings they attach to their experiences. Here, the role of the researchers is seen as a primary instrument in collecting data to make sense of the phenomenon being studied. Because my research is a case study, the generalisability will depend on the capability of my research to invite judgement from readers that the phenomenon is suited to their context (Bassey, 1999). By advancing this argument, the technique of establishing and enhancing the trustworthiness of qualitative research as mentioned above may solve the problem.

At the end, I have provided a credible research process in my research by using specific theories and paradigms. Thus, it would make my research produce legitimate new learning of real-world behaviour and its meaning.

**Conclusion**

The process of research which involves four interrelated elements to proceed with research is important to produce legitimate knowledge. This can be achieved through reciprocal links amongst “epistemology”, “theoretical perspective” (philosophical stance or ontology), “methodology”, and “method”. The choice of epistemology can enhance the credibility and trustworthiness of research as the researchers may have a good understanding on what knowledge or reality is, how it is constructed, and where it should be investigated. To this extent, the researchers can build their research approach through an appropriate lens to select an appropriate methodology and a method which suit the purposes and goals of research.

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Emotions and socially just teaching: a qualitative study

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Abstract

Purpose – The purpose of this paper is to explore Iranian EFL teachers’ and learners’ emotions in the realities of the classroom to investigate how their experience and navigation of emotions could provide the opportunity for socially just teaching.

Design/methodology/approach – A qualitative study was conducted to probe EFL teachers’ and learners’ emotional experiences. Data were gathered through interviews and observation. Using interpretive phenomenological analysis, the researchers analyzed the data through three stages of critical emotional praxis, including identification, reflection, and response.

Findings – Findings of the study revealed that emotions of caring, love, anger, and anxiety were the most dominant emotions among teachers and learners. Also, it was shown that the participants used emotion management, the cultivation of positive emotions, and bodily manipulation in order to change their course of actions and move toward two-way communication whereby they could see and hear each other.

Originality/value – The paper provided a new lens through which socially just teaching can be studied in EFL contexts. Also, the participants of the study consisted of both the teachers and the learners, because the researchers believed in a teacher’s identity as a pedagogy. In this respect, this study can also be considered as different from similar studies conducted on teachers’ emotional identities in the classroom.

Keywords Emotions, Interpretive phenomenological analysis, Critical emotional praxis, Navigation of emotions, Socially just teaching

Paper type Research paper

1. Introduction

This study probed Iranian English teachers’ and learners’ emotional life through critical emotional praxis. Furthermore, the study of emotions can deepen our understanding of the complexity of socially just teaching (Chubbuck and Zembylas, 2008), which was also addressed by this research. The researchers have addressed such an issue because “what teachers teach and how they teach it, and the varied policies that shape schooling, both serve as either channels of just and equitable or unjust and inequitable access to learning” (Chubbuck, 2007, p. 240). Addressing the importance of socially just teaching, Chubbuck (2007) considered injustice in education as the cause of the gap in students’ academic achievement “with all the ramifications for future life opportunities that academic disparity predicts” (p. 240).

In pursuit of socially just pedagogies in differently positioned South African higher education institutions, Maulucci (2013) explained that “I define socially just teaching as an ongoing struggle for more caring, equitable, and agentic schooling at classroom (micro), school (meso), and community/society (macro) levels” (p. 454). Also, Chubbuck and Zembylas (2008) defined socially just teaching as the efforts made by the teachers to transform the existing policies through the enactment of pedagogical practices which addressed the underserved students and aimed at improving their life and learning opportunities. They also argued that such pedagogical practices would empower all...
students to think about social justice and made them do their best to actualize the ideals for social justice. Reviewing the main themes of equity and justice in teaching and teacher education, Kaur (2012) considered providing the equal chance and justice for all learners as the biggest challenge for the teachers.

In fact, the present study attempted to investigate Iranian EFL teachers’ and learners’ emotional lives to probe how navigation of emotions could provide the opportunity for socially just teaching, because how individuals “choose to navigate their emotions will have a strong impact on their motivation to identify, reflect on, and respond to social justice issues” (Maulucci, 2013, p. 456). Additionally, the study was conducted in EFL contexts, because teaching English is replete with experiences of marginalization (Kumaravadivelu, 2006). Kumaravadivelu (2006) indicated that:

> By their uncritical acceptance of the native speaker dominance, non-native professionals legitimize their own marginalization. Both the process of marginalization and the practice of self-marginalization bring to the fore the coloniality, rather than the globality, of the English language (p. 22).

2. Literature review

2.1 Emotions in EFL contexts

Narrating her emotional story and history as an EFL teacher, Benesch (2012) addressed emotions in critical applied linguistics (CAL). She also argued that CAL explored emotions through the complexity of identities of teachers and learners in the classroom. Benesch (2012) also added that struggle is a word that often appears in CAL literature. Identities, classrooms, languages, and learning are described as “sites of struggle, a way to acknowledge unequal power and resistance to power in social contexts” (p. 36). In line with Sarah Benesch who not only follows CAL in its perception of emotions but also believes in the embodiment of emotions, the present study probed Iranian English teachers’ and learners’ emotions through critical emotional praxis. Although emotions were explored in EFL contexts by several scholars (Benesch, 2012; Cowie, 2011; King, 2016; Loh and Liew, 2016; Yuan and Lee, 2016), few researchers focused on EFL teachers’ and learners’ emotional lives in order to investigate how their navigation of emotions could lead to socially just teaching. Furthermore, Kelchtermans and Deketelaere (2016) asserted that “if emotion constitutes a central dimension in teachers’ work lives—a claim well-argued and empirically grounded in research—then it is plausible to hypothesis that becoming a teacher must be highly emotional process as well” (p. 430). Thus, before explaining our own treatment of emotions, the existing empirical studies on emotions in EFL contexts are reviewed as follows.

Interviewing with nine experienced EFL teachers, Cowie (2011) probed emotions that teachers experienced in their professional life regarding their relationship with their students and their colleagues. The findings of the study showed that the participants experienced the positive emotions such as the emotional warmth in their relationship with their learners, whereas they reported the experience of negative emotions concerning their interaction with their colleagues and the institution where they worked.

In addition, King (2016) studied a sample of English teachers and focused on the emotional labors which they underwent in their teaching when they had to conform to the norms of their profession. Also, King (2016) argued that “emotional labor is an important, yet neglected aspect of L2 teaching and that the investigation of teachers’ in-class emotional experiences represents a new and potentially fertile direction for future language psychology research to take” (p. 110). The analysis of self-report qualitative data revealed that the participants of the study managed their emotions in their classes to display emotions that were considered as appropriate in their profession.

Moreover, Yuan and Lee (2016) conducted a narrative study to study the identity construction of a preservice language teacher through the negotiation of the experienced emotions in his work and practices as emotions are the important parts of identity.
Indicating the complexity of identity formation and development, the findings of the study showed that teachers might experience both positive and negative emotions in their pedagogical relationships and practices, which would make them encounter challenges and conflicts in their process of becoming teachers.

Also, Loh and Liew (2016) studied ten English language and literature teachers to explore the emotional work of English language teachers in Singapore. The data were collected through in-depth interviews and were analyzed using the constant comparison. The empirical findings of the study showed the emotional challenges which teachers encountered in their profession because of the evaluation of students, the need for the cultural responsiveness, and the division between English language and English literature.

The present study also addressed English teachers’ and learners’ emotions. In fact, the researchers sought to probe the participants’ emotional experiences in the realities of the classroom in order to examine how the experience and navigation of emotions could provide the opportunity for socially just teaching. Additionally, emotions were explored through the lens of critical emotional praxis. The researchers centered on critical emotional praxis, because they wanted to fill the gap in the existing literature on emotions in EFL contexts and probe how emotions could provide the possibilities for transforming status quo. Defining critical emotional praxis, Zembylas (2012) explained that “the term ‘critical emotional praxis’ denotes how emotions can be engaged as critical and transformative forces in reconciliation education” (p. 20). According to Maulucci (2013), critical emotional praxis included three stages:

1. identification: understanding the difference between ideals and practices in the classroom and experience of emotions;
2. reflection: the attempt by agents involved in the teaching context to “evaluate the relative agency or passivity of their positioning” (p. 473); and
3. response: new pedagogical decisions and practices.

2.2 Socially just teaching

In her paper on socially just teaching, Chubbuck (2007) defined socially just teaching as teaching for actualizing social justice in the classroom whereby all students from the diverse societal groups enjoyed the equal access to learning opportunities and accomplishments. She believed that “while the choices of individual students and their families significantly shape academic success or failure, classroom practices, school policies, and structural inequities in society also have a major effect on student learning” (p. 240).

Conducting a qualitative study and interviewing with a sample of 15 preservice teachers, Chubbuck (2007) studied preservice teachers’ challenges in realizing socially just teaching. The findings of the study highlighted the importance of appropriate curricular content covering both basic and high-level knowledge and skills and addressing subjects on justice to inform and empower the learners, effective pedagogical practices including problem-posing activities and classroom discussion and debates to engage all of the learners into the classroom activities and realities, and rationale for socially just teaching which revolved around ethics and faith. The identified themes were also congruent with ideals of critical pedagogy and Ignatian pedagogy.

Furthermore, Kraft (2007) investigated how socially just pedagogies could reconstruct the existing practices and policies through an ethnographic study. Two schools committed to socially just teaching were explored. Kraft (2007) reported the importance of integrating issues of social justice across the curriculum, the utilization of socially just teaching practices, and the provision of a socially just school community and explained that “a comprehensive model of teaching for social justice is one in which social justice is
interwoven into the curriculum content, teaching practices, and learning environment of schools as a school-wide theme” (p. 87).

In 2008, Chubbuck conducted a micro-ethnographic case study to probe a novice teacher’s beliefs about socially just teaching. She studied the novice teacher named Sara, who engaged in socially just teaching to uncover her challenges and obstacles in the enactment of her ideals. For Sara, socially just teaching was a holistic practice addressing criticality, basic skills and knowledge, and high-status skills and knowledge whereby the learners eagerly and actively participated in the classroom activities and the respectful relationships between the teachers and the learners were encouraged. However, the commitment to such great ideals made Sara feel inadequacy because “she viewed social justice not merely as one goal to be pursued in teaching, but as a goal to be lived in all aspects of life, and consequently, as her primary reason for being a teacher” (p. 319). The findings of the study indicated the significance of the teacher’s self-awareness and critical reflection to prevent the reality shock considering the great ideals, which such teachers are committed to.

Chubbuck (2010) also proposed a framework to clarify the conceptualization and implementation of socially just teaching as a teacher educator. She defined socially just teaching as a cover term for curriculum and pedagogies that provided the same learning opportunities and achievements for all learners including the marginalized ones. Chubbuck (2010) explained that the engagement with socially just teaching required the teachers to identify both individual and structural causes of inequalities and to create the necessary support and recourse for the learners to overcome their problems. As was argued by Chubbuck (2010), “looking beyond the bounds of the educational system for causes of and solutions to inequity, the teacher can then assume an advocacy or activist role that challenge these societal-level issues” (p. 11). The study concluded that, for socially just teachers, such a commitment required self-reflection, self-awareness, and the recognition of one’s own emotional labor.

Focusing on positional identity and critical emotional praxis, Maulucci (2013) investigated a preservice teacher named Nicole’s navigation of emotional ambivalence in the process of becoming a socially just teacher to see how the teacher found her positions in her social contexts. Maulucci (2013) also elaborated on the meaning of critical emotional praxis and explained it as “critical praxis informed by emotional resistance to unjust systems and practices in our pedagogies and our everyday lives” (p. 454).

In a similar vein, Johnson et al. (2009) reported the vignettes of three novice teachers committed to socially just teaching based on the qualitative data collected through interviews and observation and argued that three teachers enacted socially just teaching in their own unique ways due to their students, their own background, and their own prior perception of socially just teaching. It was also reported that “it is both possible and essential for new educators to enact social justice curricula in their classrooms in a variety of ways” (p. 294). Drawing on the findings of the study conducted by Johnson et al. (2009), it was concluded that “a broad and contextually contingent definition of social justice curriculum is one that will best support and encourage burgeoning social justice educators” (p. 294).

The present study also addressed socially just teaching. The researchers investigated English teachers’ and learners’ emotional lives, because socially just teaching “is bound with the emotional lives of the individuals involved” (Chubbuck and Zembylas, 2008, p. 276). Also, the researchers sought to answer two research questions:

RQ1. How do Iranian EFL teachers and learners experience and navigate their emotions in the classroom?

RQ2. How does their navigation of emotions provide the opportunity for socially just teaching?
3. Methodology
This study was within the paradigm of interpretive interactionism. According to Denzin (2009), interpretive interactionism is an attempt to join symbolic interactionism with interpretive phenomenology to enable the readers generalize their own experience to what has been captured. Therefore, the researchers applied interpretive phenomenological analysis in line with the theoretical paradigm of the study. Chapman and Smith (2002) explained that interpretive phenomenological analysis was a qualitative research that was applied to probe how individuals made meaning of their experiences. They also argued that interpretive phenomenological analysis “allows the researcher and participants to engage in a dialogue whereby initial questions are modified in the light if participants’ responses” (p. 127).

3.1 Participants
The researchers selected 20 EFL and 20 learners from among their students. In all, 13 teachers were female and 7 were male. Among 20 EFL learners, 9 learners were female and 11 learners were male. Chapman and Smith (2002) explained that the aim of interpretive phenomenological study was to investigate how the participants made meaning of their experiences, event, and actions and argued that the interpretive phenomenological study included the detailed analysis of individual transcripts. Chapman and Smith (2002) also indicated that it was better to use purposive sampling and probe a group for whom the topic of enquiry seems to be important. The teachers were selected from a group of teachers with different years of experience. Ajjawi and Higgs (2007) argued, “the advantages of this range of experience are the richness in the depth of data obtained and the multiple perspectives illuminating the phenomena” (p. 617).

3.2 Instruments
Data were collected through interviews and observation. The main research questions, which were asked from the participants in interviews, are presented in Tables I and II.

Meta-emotion interview questions for English language teachers
1. Which of these emotions do you feel most commonly when teaching
   Happiness/joy
   Sadness/grief
   Anger/irritation
   Fear/anxiety
   Disgust
   Fascination
   Pride
   Wonder
   Enthusiasm
   Boredom
   Awe
   Questions repeated for each emotion identified by the respondent in question 1
2. Would you explain more about your dominant emotions?
3. What are your reactions to being (name of emotion)? What do these reactions have to do with your teaching?
4. Does the way you feel about (name of emotion) have a history in your teaching career?
5. Are there things you do regularly during your teaching to make sure you feel (name of emotion)? Are there things you do regularly during your teaching to make sure you do not feel (name of emotion)?

Source: Adapted from Benesch (2012, p. 111)
3.3 Procedures

The participants who were selected through purposive sampling were interviewed. Before asking open-ended questions, we wanted the teachers to tell us which emotions they felt most commonly when they were teaching. We also wanted the learners to tell us which emotions they felt most commonly when they were learning. Then, we asked them questions about their dominant emotions. The collected data were analyzed one by one. Each data item was read repeatedly and was assigned initial codes. The initial codes were also transformed into the larger and more abstract themes that indicated the meaningful patterns in the data. According to Chapman and Smith (2002), themes “capture succinctly the essential features of the initial readings” (p. 127). The relationships among different themes in each data item were identified. Subsequently, a core theme was used for each data item. The data items were compared and contrasted with each other based on their core themes. Then, the core themes were transformed into a narrative account, “where the themes are outlined, exemplified and illustrated with verbatim extracts from the participants” (Chapman and Smith, 2002, p. 127).

The participants were also observed in their classes. The focus of observations was on both verbal interactions between teachers and learners and nonverbal representations of emotions. The classes lasted approximately 130 minutes. After observations, the participants were interviewed once more to reflect on specific scenes. Each interview lasted between 40 to 50 minutes.

The participants’ emotional life were also analyzed through critical emotional praxis, including three stages of the participants’ identification, reflection upon, and response to justice issues as was proposed by Chubbuck and Zembylas (2008). As the aim was to understand how navigation of emotions could create the possibility for socially just teaching, all of the collected data through the second phase of the study were read, analyzed, and interpreted once again. According to Chubbuck and Zembylas (2008), identification involves experience of particular emotions due to the perception of unjust practices and relationship in the educational contexts. Chubbuck and Zembylas (2008) also defined the reflection as follows:

In this phase, teachers may experience critical dissonance (mismatch between theory and practice or ideals and practice) and emotional ambivalence. They also engage in sense-making as they

<table>
<thead>
<tr>
<th>Table II. Interview questions for English language learners</th>
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<tr>
<td>1. Which of these emotions do you feel most commonly when learning?</td>
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<tr>
<td>Happiness/joy</td>
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<tr>
<td>Sadness/grief</td>
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<tr>
<td>Anger/irritation</td>
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<td>Fear/anxiety</td>
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<td>Disgust</td>
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<td>Fascination</td>
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<td>Pride</td>
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<td>Wonder</td>
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<td>Enthusiasm</td>
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<tr>
<td>Boredom</td>
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<tr>
<td>Awe</td>
</tr>
<tr>
<td>Questions repeated for each emotion identified by the respondent in question 1</td>
</tr>
<tr>
<td>2. Would you explain more about your dominant emotions?</td>
</tr>
<tr>
<td>3. What are your reactions to being (name of emotion)? What do these reactions have to do with your learning?</td>
</tr>
<tr>
<td>4. Does the way you feel about (name of emotion) have a history in your learning career?</td>
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<tr>
<td>5. Are there things you do regularly during your learning to make sure you feel (name of emotion)? Are there things you do regularly during your learning to make sure you do not feel (name of emotion)?</td>
</tr>
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</table>

Source: Adapted from Benesch (2012, p. 111)
evaluate the relative agency or passivity of their positioning, or the extent to which they can actively position themselves or find their agency truncated as they are positioned by the social, political, or cultural context (positional identity) (p. 473).

The third stage was also response and included new pedagogical practices and decisions.

4. Findings of the study

The analysis of the data showed that emotions of anxiety and love were dominant in both the teachers and the learners. Also, emotions of caring and anger were dominant in teachers. Love was the fruit of teachers’ beliefs toward teaching emerging not only in teachers’ interactions with their learners but also in the relationship of each individual teacher with her own self as a teacher and as a human. From the learners’ perspectives, love also emerged through the two-way interaction between the teacher and the learners where they found the possibility to reveal their characters. The following example was extracted from the data collected from the teachers:

How can I explain it? I was a very good student when I was a schoolgirl. All teachers expected me to be a physician. But I made a different decision. I wanted to become an English teacher because I love it and because I loved the English classes that I had with my first English teacher. Now, I also love my students.

The following is another example extracted from the data collected from the learners:

It is natural that such teachers listen to their students passionately and eagerly because they respect and love their students. That means all are equal and enjoy the equal chance to reveal themselves because the teacher loves all of us like the members of her family.

Caring was another dominant emotion in teachers. Caring addressed both students and subject matters to be covered in the classes. They explained that how much their students, their needs, and problems are important to them. They also talked about the valuable and challenging subjects whereby both their students’ and their own stories could be read. The following example was also reported by one of the participants of the study:

A teacher is responsible teacher who thinks about the students and takes care of them. Thus, I choose caring as one of the important emotions in such classes. It means that a teacher should protect his students against all problems and serve their emotional and educational needs. Therefore, I ask them to help me choose topics for our class. When topics are chosen from their experiences and are interesting for them, they will be involved.

In addition to the positive emotions of caring and love, both the teachers and the learners referred to the emotion of anxiety. Among the teachers, anxiety was mainly resulted from their sense of responsibility and obligation in accomplishing their own duties as teachers. As it can be understood from the following examples, the teachers chosen as the participants of the study checked and rechecked their mind, diaries, and activities in the classroom to see how much they were successful in accomplishing their duties and obligations:

It is not so easy. You know, we should analyze ourselves and the effect of our teaching on our students. Students are human beings and our responsibility is great. So the anxiety is the important emotion among the list.

Observing their teachers’ sense of responsibility, the students also analyzed themselves repeatedly to accomplish their responsibility toward their teacher. They explained that they did their best to accomplish their obligations toward their teacher. The following is an example, which was extracted from the interviews with the learners:

If the aim is to develop students, there should be an attempt to know the world of students. Students are changing all the time. So they can change the class and make the teacher change.
The teacher should worry and think about the unexpected events that can happen. The students who see such a kind and responsible teacher cannot be indifferent. They will try to be the best. All of us are anxious because we want to be the best towards those who are very important for us.

The teachers also referred to anger when talking about the inappropriate quality of teaching due to the existing rules in which the voices of the students indicating their differences are overlooked and there is no place for individuality and diversity. They also felt the anger facing those colleagues who uncritically followed such rules. The following example is another example extracted from the collected data:

Anyway everything will be evaluated based on our students’ final scores. These scores can influence their choices in the future. It is better to say that these scores can shape their future. But how fair are the scores. I mean students are really different but curricula are really traditional. All of them are prescribed in the same way. Many different students will lose many chances. It irritates me.

The participants also explained that they did their best to control their negative emotions and display those emotions that they considered as appropriate based on their duties and roles as teachers and learners. This was called as emotion management. They also indicated that it was very important for them to enrich their positive emotions through their attempts to provide the opportunity for two-way communications with their interlocutors. They asserted that it was very important for them to listen to their students and colleagues in order to enhance the positive mutual relationships. This was also called as cultivation of positive emotions. The following examples were extracted from the interviews with the teachers and the learners:

Anger or anxiety are not so appropriate for our students. Even if I am angry or anxious, I should be able to control my feelings. I do it to create a friendly and secure class where all of us can trust each other.

It is something that takes place in my inner world. I am feeling a negative emotion but try to smile or even laugh because my students are more important than all other external problems. It is not because of my hypocrisy. It is because of my sense of duty. It is not their sins that I am not OK.

The teachers also referred to bodily manipulation by which they could reflect their emotions through their body. The researchers’ poststructuralist stance made them notice this aspect of teaching on the basis of following argument by Perry and Medina (2011): “the body is our method, our subject, our means of making meaning, representing, and performing” (p. 63).

Clarifying the important role of body in the class, Tobin and Hayashi (2015) also explained that:

Teachers, like practitioners in other field, often find it difficult to describe how and why they use their bodies in certain ways to achieve certain effects. These embodied practices are not mindless but usually tacit, non-verbalized, and not easily made conscious (p. 327).

The example extracted from the data eloquently reflects the importance of the body based on our participants’ understanding:

I never lie and my eyes show everything. All my emotions are reflected in my eyes. I can say that when I feel comfortable with my audience, I directly look at them because I can show myself without any conflict. If there is not opportunity for being real, I look at the earth. But recently I use another strategy. Directly and calmly looking at the person who makes me show myself what I am not to persist and make him see my reality.

5. Interpretation
The analysis of the data revealed the dominance of caring, love, anxiety, and anger. Illuminating the meaning of caring, Noddings (1988) referred to the relational nature of caring whereby both the teachers and the learners are involved. Cowie (2011) also referred to liking students and caring for them as the most important reasons by which teacher could create emotional warmth in the classroom.
The love was also one of the dominant emotions among both the teachers and the learners. Fromm (1956) argued that “love is an activity, not a passive affect; it is ‘standing in’, not a ‘falling for’. In the most general way, the active character of love can be described by stating that love is primarily giving, not receiving” (pp. 17-18).

In the present study, the teachers mainly referred to the emotion of anger in response to the imposed rules of the educational system which ignored the diversity and individuality of students and were founded on the one-size-fits-all policy. Anger was also the emotion which the participants of Cowie’s (2011) study felt toward their colleagues and institutional contexts as “the result of longer-term states such as whether or not an institution was fair or just, and whether collegial relations were supportive and cooperative” (p. 240).

The teachers also talked about anxiety due to their sense of responsibility toward their learners. The learners also referred to anxiety as an emotion that they felt because of their sense of responsibility toward their teachers and their beliefs that putting all responsibilities on teachers’ shoulder is unfair. In fact, teachers felt both positive and negative emotions. Yuan and Lee (2016) also explained that teachers might feel both positive and negative emotions in their pedagogical relationships and practices when experiencing challenges and conflicts in their process of becoming teachers. In this study, the learners also felt both positive and negative emotions.

The participants’ beliefs in the agency of their position in the educational context as teachers and learners made them navigate their emotions through emotional management, cultivation of positive emotions, and bodily manipulation in order to transform their course of actions. King (2016) argued that “teaching involves high levels of emotional labour as teachers are required to manage and display particular emotions in appropriate ways in front of students” (p. 97). Moreover, Zembylas (2004) argued that “in the act of controlling emotions, through the obligation to produce verbal and nonverbal expressions that are true to these rules, through the self-examination that precedes and accompanies emotional expressions, teachers become subjects for themselves” (p. 188).

The participants’ response to their course of actions was also reflected through pedagogical decisions and the new pedagogical practices in terms of two-way communications and the change of bodily movement in the classroom. Furthermore, the emotions of caring and love indicated a socially just teaching which moves “beyond narrow secular self-interests and economic ends” (Reay, 2012, p. 3). The positive emotions of caring and love were very important, because they made teachers consider all students as important despite their diversity or differences or their strangeness based on the accepted standards. The learners referred to the importance of love in their relationship with their teachers through which they could be seen and heard. Explaining the meaning of love, Fromm (1956) also indicated that:

Indeed, to speak of love is not preaching, for the simple reason that it means to speak of the ultimate and real need in every human being. That this need has been obscured does not mean that it does not exist. To analyze the nature of love is to discover its general absence today and to criticize the social conditions which are responsible for this absence (p. 104).

6. Conclusions and implications
The present study focused on the emotional lives of Iranian EFL teachers and learners in order to examine how their attempts for navigation of the emotions could provide the opportunity for socially just teaching. The analysis of the data revealed that four emotions of love, caring, anxiety, and anger were dominant. The coexistence of two strong positive emotions of love and caring and two strong negative emotions of anger and anxiety indicated the complexity of the realities of the classroom.
The reality of the classroom consisted of the teachers, the learners, the subject matters, the teacher-students relationship, and the teachers’ relationships with their colleagues and educational system. Thus, three characteristics of emotions in teaching as proposed by Zembylas (2004), including evaluative, interpersonal, and political that create the context of teaching were addressed by this study. Evaluative feature means the teachers’ evaluations of “their world-classroom, students, teaching, learning, and the like” (p. 190). Emotions are also about the interactions and relationships occurring in the classroom. Moreover, they make the teachers evaluate themselves. Zembylas (2004) also argued that “acknowledging the power of emotions enables teachers to better transform their relations to their students and to the subject-matter itself so that they can create emotional connections with students” (p. 199).

In the present study, the power of the emotions of love, caring, anxiety, and anger was acknowledged by both the teachers and the learners in their attempt to create their emotional connections with others in the educational system through two-way communications whereby all the people involved were considered as equal individuals and there was a “concern with intra-school and classroom diversity so that possibilities for social mixing are enhanced” (Reay, 2012, p. 6). The findings also revealed the importance of bodily manipulation. As was argued by Zembylas (2004), using poststructuralist conception of emotion as the analytic lens “has the potential for enriching our knowledge about emotion and its impact on curriculum, teaching and teachers” (p. 947).

References


Further reading


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Hair and outrospection in the nonprofit and public sectors

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Abstract

Purpose – Take the word “research,” combine it with the words “experiences around hair,” and you inevitably get a personal story. Whether it’s concerns about too much hair, complaints about one’s lack of hair, or the ability of hair to intimidate or convey authority, questions related to hair appear to provoke passionate responses in the form of narratives. The authors believed “hair” stories would provide a unique method for examining employment realities in nonprofit and public sector workplaces. The paper aims to discuss these issues.

Design/methodology/approach – Attendees at the 2009 Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) conference were invited to a symposium discussing what “hair” might indicate about the lived experiences of individuals employed in nonprofit and public sector workplaces. A participatory action research methodology was used to engage 24 academics and practitioners in structured small group conversations about workplace hair-related image management issues. A storytelling framework was used to guide the content analysis of the 305 narratives generated by two focus groups.

Findings – The interview questions were literal ones, yet the responses that were elicited were figurative. As the process unfolded, it became clear the focus group participants had to tell their own individual stories, in their own way, before they could answer the research questions. Hence, the storytelling dimension became a critical component of this research as a vehicle for conveying the power behind what may have initially appeared to be a simple set of questions and answers.

Research limitations/implications – Selection bias in this study was unavoidable, given the voluntary nature of participation and the transparency of the study’s purpose. Given the chosen research approach, the project findings may also lack generalizability. However, since the so-called “subjects” of the investigation are the same persons found in sector workplaces, there is no way to avoid this limitation in any related assessment.

Practical implications – This project allowed for a new understanding of how the direct and literal approach often used by social scientists to investigate the impact of attitudes and perceptions on social outcomes might best be replaced or augmented by methods that uncover the ways in which subjects frame the effects under examination within the context of their personal experiences.

Social implications – One’s appearance takes on professional and, often, political ramifications whether the individuals involved desire this or not. Ironically, one’s ability to appear more casual may be one of the benefits of working in the nonprofit or public sectors as a means of connecting to constituents and stakeholders. However, given the need to serve multiple and competing audiences, this ability to identify and connect with others may have unintended consequences that may not be experienced in the private sector, where stakeholders may have a more unified set of goals.

Originality/value – This project focused on a relatively under-researched audience and subject: hair and image management. Each day, individuals make a choice about their appearance, which includes their hair.

The authors acknowledge the data entry and analysis support provided by research assistants Dharma Khalsa, Emily Lau, and Aubrey Leung along with the review suggestions offered by Dr D.T. Ogilvie, Rochester Institute of Technology.
For those working in the nonprofit and public sectors, especially women and people of color, there appear to be implicit areas of concern that manifest themselves in the workplace, many of which were identified through this research.

Keywords: Narratives, Perception, Storytelling, Hair and image management, Public and nonprofit sectors

When asked why she colored her auburn-brown hair blonde, the female staffer from *The Oprah Show* stared into the television camera, burst into tears, and explained, “I just want to be pretty!” (obtained November 20, 2009 from www.youtube.com/watch?v=MDejt6HHHtQ).

In this paper, we investigate why questions about hair trigger both emotions and intimate revelatory responses. Webster’s Dictionary defines hair as “a threadlike outgrowth from the epidermis of plants, mammals, and other animals” (www.merriam-webster.com/dictionary/hair). But it appears to be more than just a “physical growth.” Ask any man, woman or child what it means to have hair, and a floodgate opens. Individuals will state whether they think they have too much or too little of it or whether they consider their hair too straight, too curly or too unmanageable. As evidenced in the referenced television episode, a relatively straight-forward hair-related question may evoke feelings that exceed what one might expect in a response, making it clear that the word “hair” is more than just a noun.

Historically, “hair has been fashioned to exhibit beauty, removed to cause humiliation, and interpreted as a sign of strength, power (often destructive), or powerlessness” (Koppelman, 1996, p. 87). Culturally, the role hair plays varies significantly across institutional settings. In the military, men’s hair is initially removed and always controlled (Yoshino, 2006); in public settings, women of various religions or cultures are required to “cover” their hair (Bronner, 1993; Mageo, 1996). In nonprofit and public administration organizations, where over 70 percent of the workforce is female compared to 46 percent across other industry sectors (cited by Van Buren, 2004), hair is an important aspect of one’s professional image presentation. The nonprofit and public administration sectors also employ a higher percentage of persons of color compared to private industry. Consequently, the role of hair in the workplace, particularly among African American employees, has been the subject of high-profile administrative and legal battles (Rosette and Dumas, 2007).

Although hair is only one element of an employee’s overall physical appearance, judgments about it appear to weigh heavily in general hiring decisions, promotions, performance appraisals and other workplace outcomes (Capek and Mead, 2006; Page, 2007). As a result, hair grooming is an important aspect of professional image presentation for women and people of color (Pynes, 2009; Schumann, 2001). However, these same individuals may experience stress when trying to conform to workplace aesthetics: predominant institutional grooming norms may run counter to their cultural values, particularly when what is deemed “appropriate” is defined by European American and male standards (Hewlin, 2003; Roberts, 2005; St Onge et al., 2009). One might wonder if the perception about competency, as evidenced by workplace image, is part of the reason why, despite their percentages within the general employee population, only 5.2 percent of nonprofit organizations with budgets over $5 million have chief executives who are female and only 12 percent have chief executives who are people of color (Van Buren, 2004).

Given these questions, “hair” – its management and associated workplace impacts – is a reasonable subject of interest for research professionals. Worldwide, hair-care products and related services generated $49 billion in revenues in 2010 (Lopaciuk and Loboda, 2013); in the USA alone, the industry generated $7 billion and employed over 712,000 individuals as recorded in the 2010 US Census (US Bureau of Labor Statistics, www.bls.gov/ooh/personal-care-and-service/barbers-hairdressers-and-cosmetologists.htm). These financial markers validate the importance of hair as part of either individual or collective workplace attraction, retention, or promotion strategies.
We decided to narrow the loci of our hair-related research to workplaces in the nonprofit and public sectors since, as previously indicated, their workforces are predominantly female and ethnically diverse. We believed a discussion about how women and people of color manage to negotiate their workplace gender and ethnic identity image presentations within these defined industry sectors would be timely, given increasing employment diversity in the USA.

We chose the 2009 Annual Association for Research in the Nonprofit and Voluntary Sector (ARNOVA) conference as the physical location for our initial data collection. Its website (www.arnova.org) indicates that ARNOVA is the “leading interdisciplinary community of people dedicated to fostering through research and education, the creation, application, and dissemination of knowledge on nonprofit organizations, philanthropy, civil society, and voluntary action.” We determined that the annual ARNOVA conference provided a unique opportunity to speak to both nonprofit researchers and practitioners about their experiences with hair and image management “in the field” and to complete a cross-sector comparison about the implications thereof.

We asked a relatively simple research question to discover what “hair” might tell us about the lived experiences of individuals currently in nonprofit and public sector workplaces. We also decided to conduct this research in collaboration with other academics as well as practitioners as part of an effort to collectively deepen our understanding of day-to-day operations within these two sectors. Toward that end, we determined that our research questions as well as our empirical methods needed to incorporate a mutuality that only could be achieved if our participants were concurrently co-researchers and vice versa. A rationale for this research partnership follows.

**Outrospection and participatory action research (PAR)**

Philosopher Roman Krznaric (2012) coined the term “outrospection” to provide a new way to approach relationships. Outrospection is a way to get to know oneself by developing relationships and empathetic thinking with others. Krznaric does not see empathy as a soft social concept used to connect with those who are dis-empowered, but rather as a self-discovery process conducted by stepping outside ourselves and concurrently exploring the lives of other people and cultures.

Critical race theorists argue that social reality is constructed “by the formulation of and exchange of stories about individual situations” – stories that concurrently “serve as interpretive structures by which we impose order on experience and it on us” (Ladson-Billings and Tate, 1995, p. 57). Researchers who ascribe to this perspective increasingly argue that to truly understand how processes affect communities, the authentic voices of impacted members should be brought front and center and outrospection is one means of accomplishing that task.

While there are a variety of ways communities can offer unfiltered experience reflections, PAR is unique in that the very nature of the research conversations and relationships are under the direction of the participants as co-researchers (Chevalier and Buckles, 2013). PAR emphasizes principles of collective inquiry and experimentation grounded in experience and social history. Within a PAR process, “communities of inquiry and action evolve and address questions and issues that are significant for those who participate as co-researchers” (Reason and Bradbury, 2008, p. 1).

PAR practitioners make a concerted effort to integrate three basic aspects of their work: participation (life in society and democracy), action (engagement with experience and history), and research (soundness in thought and the growth of knowledge) (Chevalier and Buckles, 2013). Through this process, the traditional researcher/subject dichotomy is disrupted: while the researchers may provide a general investigative framework, the research process is guided by the participants as co-researchers and the researchers concurrently are engaged as co-participants.
Narrative transportation
One of the surprising elements associated with beginning this project was the enthusiasm and stories generated among the research team itself as we prepared our symposium proposal. We found ourselves sharing personal “hair” stories throughout our pre-symposium preparatory teleconferences. Thus, we realized it was essential to identify theories that could support what we were discovering as a part of developing this particular line of research.

As we examined potential theoretical frameworks, we looked at various psychological constructs, beginning with narrative transportation. Narrative transportation describes a process whereby a subject is moved through hearing, viewing or telling a story into the action it portrays, causing them to become lost in that same story (Deighton et al., 1989; Nell, 1988). The marketing literature indicates that this process occurs whenever the story receiver experiences a feeling of entering a world evoked by a narrative because of empathy for the characters and imagination of the story plot (Van Laer et al., 2014). The effect of narrative transportation, which manifests itself in the story receivers’ affective and cognitive responses, beliefs, attitudes, and intentions, allows the listener to be transported into an internal world that can modify their perceptions (Green and Brock, 2002).

While we found elements of narrative transportation occurred among ourselves in response to the sharing of hair-related stories, we determined that, because our narrative reactions were being triggered simply by asking a hair-related question, something else might be in play. We, therefore, returned to the stories themselves and decided that the theoretical framework of storytelling itself might best serve to make sense of what we were finding.

Storytelling
Researchers have documented that ordinary individuals do not follow the paradigmatic modes of inference, abstraction, and generalization favored by science (Baumeister and Newman, 1994; Koch, 1998; Ladson-Billings and Tate, 1995; Weick, 1995; Zukier, 1986). Rather, they tend to engage in what are called “narrative” modes of thought, constructing coherent stories about particular life experiences, “which are temporarily structured and context specific” (Baumeister and Newman, 1994, p. 677). This need for coherency is crucial: Bruner (1990) found that, when confronted with confusing and contradictory social information, people try to make up plausible stories that can tie such data together. Further, individuals often choose to tell a story about someone (i.e. “here is the crazy thing she was doing when Mary and I met”) rather than simply provide a trait description (i.e. “I spotted this tall, blonde woman and went over to speak to her”), thereby allowing the listener to make what might seem to be an obvious inference. For example, Reiser et al. (1986) found that, when asked to recall a time when they went to the library, the responses the researchers received focused on reasons why the respondents might have wanted to go to the library rather than simply descriptions about dates and times when they went.

Why might a question about “when” receive a response that might be categorized as “why”? As noted by Reiser et al. (1986), since most experiences involve deliberate behavior designed to achieve some goal, there is a direct link between the referenced question (please recall a time when you visited a library) and the response (this is why I went). Baumeister and Newman (1994) found that when individuals were asked about their autobiographical memories, they could recall the memory more rapidly if they were primed by a goal-derived, rather than taxonomic, category.

The research team believed that it was highly likely that these narrative ways of thinking would be an integral part of an examination of the lived “hair” experiences of individuals working in the nonprofit or public sectors. Toward that end, we determined that the Baumeister and Newman’s (1994) four-needs narrative framework might offer the best means for analyzing and making sense of the data we collected at the ARNOVA conference.
Specifically, this framework identifies four distinct motivations that generally guide narrative thought. First, individuals may interpret their personal experiences vis-à-vis objective or subjective purposes. Second, people may construct stories that portray their actions and intentions as good. Third, individuals may create stories that contain information about how they or a reference group exert control over life circumstances. Finally, people may affirm their self-worth by telling stories that depict their or their reference group’s attractiveness and competence. We concluded this sense-making theoretical framework provided the most useful tool for examining the concepts we expected would surface from the data collection (i.e. focus group conversations) since it could serve to validate the motivational connections between personal narratives, individuals’ meaning making, and social understanding.

Methods

Research design and sample

Given our desire to mutually collect stories, we decided to use the PAR process to gather data at the 2009 ARNOVA conference. Toward that end, we invited the entire general ARNOVA membership to participate in a scheduled Saturday conference symposium entitled “I am not my hair: Differences and barriers in the nonprofit sector.” Electronic invitations announcing the topic, date, and location were sent to various association subcommittees and flyers were physically distributed and posted at the conference location.

Our recruitment efforts resulted in 24 symposium participants. While only seven were male, there was a mix of ethnicities and ages represented. Some respondents volunteered that they were newly employed (under one year), while others stated they had many years of nonprofit or public sector experience.

Following a collective introductory session, where the overall project research issue was introduced, collaboration on the research effort was requested. A five-minute hair-related video clip from a Fall 2009 Oprah Show was presented, and then the attendees randomly divided themselves into two smaller groups. The five research team members also randomly distributed themselves, with two or three research team members serving as interview guide facilitators for each group. After providing an oral consent advisory and obtaining permission to record the small group conversations, the research team facilitators led participants through a discussion of four grouped questions. The questions asked about workplace norms in the nonprofit/public sectors compared to those in the for-profit environment as well as individuals’ personal choice to conform with workplace hair grooming norms (see the interview guide in the Appendix).

Hard copies of the interview questions were provided within each small group. While every participant did not have a hard copy of the questions, those who did were asked to share their versions with adjacent members and vice versa. Each group of questions was orally raised sequentially by the small group facilitators, and participants were encouraged to answer in a round-robin fashion so that everyone in the small group could contribute. Those individuals who did not want to provide a response simply indicated this to the facilitator, who then moved on to the next person in the circle without comment.

As part of the PAR process, the facilitators also personally responded to some of the interview items, although, in the interest of time and a desire to hear from non-research team members, the facilitators did not respond to every question. Facilitators and others in the group were encouraged to raise clarifying questions when individual responses were unclear or required further explanation. The session lasted slightly more than 110 minutes and resulted in 15 pages of oral responses across the two focus groups. Outside of conference-provided coffee, tea, and water, no other compensation was given to any of the focus group participants.
Data analysis

The two small group discussions were electronically recorded and subsequently transcribed. Four coders (three research team members and one research assistant) were then asked to independently review the transcripts using an analysis guide that was mutually developed by two members of the research team. This guide was developed prior to the review of the transcript documents by any members of the coding team or the research assistant. The coders were instructed that the unit of analysis was to be each respondent’s narrative and that the unit of coding was to be the entire response, the response to each question, the paragraph, the phrase, or the sentence (Boyatzis, 1998).

The analysis guide followed the four-needs model developed by Baumeister and Newman (1994) but further asked if the shared story or anecdote focused on an individual’s actions (usually indicated by the use of “I” or “we” statements) or referenced something attributed to a vague third party (usually indicated by the use of words such as “they” or “everyone”). The instructions also provided some code guidance designed to orient the research assistant without overly influencing her subsequent analysis. The final story analysis guide is detailed in Table I.

The analysis guide was designed to assure qualitative validity and reliability (Creswell, 2009). A narrative could be placed into any of the Baumeister and Newman (1994) four-needs classifications, even if only one of the coders independently catalogued it as such.

The narrative evaluations, as reviewed by each of the individual coders, were then incorporated into a qualitative software program (NVivo 10) by a research assistant not involved in either data collection or classification. The software enabled a rapid characterization of a particular narrative into one of the four-needs classifications. In addition to reviewing the various narratives, the coders were asked to capture their evaluation reactions in the form of analytic memorandums. The reflections identified in the various analytic memorandums were reviewed as a part of the research synthesis and, as appropriate, these reflections are captured in the analysis section of this paper.

Consistent with PAR, researchers using this method try to present the participants’ stories or phrases in a manner similar to how they were gathered during the data collection process with a minimum of interpretive analysis. We, therefore, note that our research reflections about what the collective words indicate are simply our subjective interpretations about so-called “meaning,” which represent merely one way of understanding what has been said. Our broad categorization of the hair narratives, using Baumeister and Newman’s (1994) four-needs sense-making tool, follows.

Findings

Narratives have frequently “provided a way to add stories that had traditionally been excluded from educational research” (Hendry, 2007, p. 491). We discovered the truth of this

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<tr>
<td>1. Stories that interpret life experiences relative to an objective or subjective purpose</td>
<td>Highlight in green</td>
<td>Highlight in red</td>
<td>Compares example against some standard</td>
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<td>2. Stories that depict the individual’s or group’s good actions or intentions</td>
<td>Highlight in magenta</td>
<td>Highlight in brown</td>
<td>Indicates some type of judgment about the example (good/bad)</td>
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<td>3. Stories that indicate how control is exerted over situations</td>
<td>Highlight in yellow</td>
<td>Highlight in olive</td>
<td>Exemplifies individual/group control over some life circumstances</td>
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<td>4. Stories that portray the teller’s individual or group attractiveness and competence</td>
<td>Highlight in blue</td>
<td>Highlight in gray</td>
<td>Measures individual/group self-worth or values</td>
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Table I: Four-needs storytelling analysis guide
assertion as we considered what happened during our data collection. To move forward with this project, we had to fundamentally adjust our planned symposium framework to accommodate participants’ stories prior to continuing with our research. Unless their stories were aired, our co-researchers, in their role as participants, were not willing to move forward to respond to our formal interview questions.

While we had anticipated this outcome because of our own pre-symposium work, it was useful to have empirical validation that, in order “to increase our rigor, we need to be more faithful to our relationships and not impose more methods” (Hendry, 2007, p. 494). In this same spirit, we present the collected stories from the 2009 small group discussions between our co-researchers and ourselves and outline our analysis of the same.

Need for purpose narratives
Baumeister and Newman (1994) note that people’s “need for purpose” (p. 681) is usually addressed by presenting events in relationship to some objective or subjective state. The authors remark that individuals evaluate current situations in relationship to future goals (desired objective circumstances) or fulfillments (desired subjective circumstances) (pp. 681-683). Not every narrative may meet this criterion: for example, people do tell stories about unintended consequences. They may also contrast current and ideal situations, increase or exaggerate the fulfillment associated with a story, or reinterpret prior, unpleasant events as movement along a continuum toward some desired outcome (p. 683).

At least one or more members of the coding team catalogued 165 narratives as being part of this first category of purposeful interpretation. Of those, we found 73 narratives that used the words “I” or “we” to discuss experiences the speaker compared to either an objective or subjective standard and another 92 narratives, that either did not indicate who was involved or used words like “they” or a referenced group. Examples of this category of collective narratives from a group perspective follow.

In response to the question about how hair and nonprofit leadership, a respondent said:

You know when I ask my students about leadership and the implicit perspective of leadership; they say, a leader is a man who is tall and has a little bit of gray hair.

In response to a follow-up question about women who are tall and have gray hair, the following sequence of stories was offered:

Gray hair is seen as valued for men and not for women. For example, if you look at Grecian Formula commercials, the guy having a conversation with someone, he has to get it right, all the way gray and dark. Maybe that’s because society, in general, has a value of wisdom for men rather than for women.

Another participant followed on, stating:

I don’t know how hair impacts women’s ability in nonprofits. Nonprofits are more or less tolerant about attire and hair styles. I have heard people raise an eyebrow at hair that would seem as more teenage hair: really long hair. Real long hair is youthful for white women. Straight long hair, more tousled is seen as more youthful, rather than styled hair or women of a certain age, who have shorter hair.

Then, in response to a follow-up question about whether it is okay to have long hair if you are a woman over 50, a participant responded:

There are some assumptions when you hit the interaction of age and appearance. As you age, you move into a different territory of how you are supposed to look, and different things like that are more flexible for men. You can shave your head bald if you are a man.

Another participant then offered these hair comments related to baldness:

If women are bald, they are assumed to have cancer, or they must have a friend who has cancer, and they’ve shaved their heads in solidarity. Interesting, what bald means if you are white. If you
are bald and a person of color? It depends upon who you are because you are not allowed to shave your hair. It might be okay for African American women, but it’s not acceptable for Latinas.

The next participant stated:

It may not be acceptable for Latinas, but for older African American women with beautiful short hair – you know, there are regional differences, too. In Michigan, if you have really short hair and you are an African American woman, you are seen as elegant. If you’re white, you will think they’re undergoing cancer treatment, but no one will ask! However, the assumption exists if you are white and female, everyone thinks you have cancer.

Finally, a respondent summarized:

Interesting [...] so we have these shortcuts: Short hair and white female equals cancer. Short hair and Latina women equals cancer. Short hair, black women may be okay. Asian women don’t have a norm: they can just wear short hair and not style it. Asian women are sort of invisible in their hair.

One of the facilitators then asked: what do we know about Asian women’s hair?

The last participant explained:

For Asian females, I imagine sleek and more straight, and that is the stereotype. This is what I have seen, and it appears to be a kind of the norm.

We noted that this narrative string incorporates both gendered and ethnic comparisons related to ideas about hair and nonprofit leaders. A discussion about gray hair and “wisdom” quickly devolved into subjective and relatively stereotypical judgments about the objective fact that some women have short hair. While several of the individuals indicated that short hair on women was “normally” equated with having cancer, depending upon the ethnicity of the individual being evaluated, they pointed out that this was not an automatic classification and could be “qualified” depending upon the referenced woman’s ethnic group.

The comparison narratives about hair and men were slightly different but no less judgmental from those offered about hair and women. This contrast is exemplified in the following comments:

We had a colleague, a white person with dreadlocks and politically correct. We know when he is sober and clean because he cuts his hair. For him, the way he was, he had trouble in the field; because of his appearance, we thought of him as a pothead, and he knew that. And part of wearing the dreadlocks was his identity as a pothead. He had trouble in agencies getting jobs. His hair represented his drug use, a sign of drug use, and his purposeful stepping out of the norm to make a statement because he was using drugs. This is an over-generalized statement. From a youth perspective, youth will have long hair. This guy was 35. It changes with age. If you look at a man in his 50s with a long ponytail, then he used to be a hippie or youth riff raff. He may not get a position at an organization.

Another participant followed with this story:

The person I am thinking about is a Hispanic finance director of a city, 45, and he used to have short hair. Now he wears it down to his shoulders. He indicates that he wants to express his indigenous heritage. He is with bankers and finance directors; he has the back clipped, and he is well-groomed and conservatively dressed but with this ponytail. There is some implication if you spend more time on it, you care about your appearance. If you’re a man and your hair is long, but it is visibly trimmed and framed, then people assume that the man is making an investment in looking professional and his appearance is tolerated.

A facilitator then asked:

The dreadlocked white guy looked like he rolled out of bed every morning, but if he were groomed and a Hispanic or African American man, would that be considered okay?
The participant answered:

For some people, it is viewed as culturally appropriate that the African American has dreads as statement of self, somehow, and the white guy was just imposing on someone else’s culture. Why are you doing that?

A male respondent offered this final comment:

If you are Latino or Native American, you can wear your hair long. I live on a reservation, and my university is across from a reservation. There are lots of Native American people on campus, and no one blinks an eye if they wear their hair long in a ponytail because it’s assumed it is part of their culture. And admittedly, university campuses are more tolerant of people’s dress. The person I’m thinking about, he was a social work faculty member. However, when he went to a Tier 1 school, he cut his pony tail. Now he looks conventional. This guy is the most genuinely feminist guy, so for him, he wore his hair long and kept it nicely combed. For some reason, he felt it needed to be cut.

Our analysis of these purposeful stories about men and hair revealed some of the same intersectional issues as did those about hair and women, particularly when it came to the subject of ethnicity. The narratives reveal that, depending on their ethnicity, women or men were subject to differing allowances when it came to hair length: short hair was not viewed as a positive trait for women other than African Americans; long hair was not viewed as a positive trait for white men but was for men of other ethnicities.

One of the other interesting things we found was many of the stories that we catalogued as “purposeful” also appeared to tap into general societal stereotypes more frequently than did narratives that were characterized as falling into one of the other four-needs categories. We are unclear as to why a discussion about “hair” both triggered these stereotypes as well as appeared to support respondents in sharing their feelings about the same. However, we wanted to note the frequency of this occurrence, particularly within this category of interpretive narratives.

Good actions and intention narratives
Baumeister and Newman (1994) indicate that demonstrating a firm sense of right and wrong frequently enters stories about one’s behaviors. The authors note that these narratives help justify an individual’s actions and concurrently allow the associated person to believe that what he or she has done is both right and good (p. 683).

At least one or more members of the research team catalogued 44 narratives that fell into this second category. Of those, we found 20 narratives that used the words “I” or “we” to discuss speaker experiences that provided a justifiable basis for subsequent actions and another 24 narratives that either made no reference to who was involved or used words like “they” or a referenced group. An example of this type of narrative from an individual perspective follows:

I started wearing my hair natural about ten years ago […] since I made this decision, I never thought about changing it. The issue I have now is the gray, and a few years ago I considered dyeing it […]. It’s odd looking around and realizing that you’re the only gray-haired woman [not because of age differences].

The research team felt that behavior justifications were central to the narrative example provided here. In this case, judgments about the perceptions of external others regarding what is an appropriate hair color for older women were identified as potential triggers that could cause an individual to modify her subsequent behavior — or not. The narrative raised interesting but unanswered questions for the research team as recorded in their analytic memos including what penalties might be associated with not conforming to external expectations of women and gray hair? Would the individual involved be willing to incur those penalties and, if so, under what circumstances? Would the individual’s hair color decision have been the same if she were not working in the nonprofit sector? All three of these questions could form the basis for future hair-related research.
Control over circumstances narratives

Baumeister and Newman (1994) indicate that a key motivational factor behind storytelling is to allow people to have the opportunity to shape their experiential narratives to increase their sense of efficacy (p. 685). Exerting this type of control gives the narrator a chance to describe a stable and welcoming environment where one can expect a positive outcome, otherwise known as the “ [...] and they lived happily ever after” story.

At least one or more members of the research team catalogued 59 narratives as falling into this third category. Of those, we found 24 narratives that used the words “I” or “we” to discuss experiences that the speaker related to personal or group efficacy and another 35 narratives, that either made no reference to who was involved or used words like “they” or a referenced group. An example of this type of narrative from an individual perspective follows:

I think in corporate [America][...] there’s more push to conform [...] in academia – [there’s] more flexibility to be who you are [...] because you’re smart [...].

The research team believed this narrative affirmed the teller’s sense of efficacy by demonstrating either control or the lack thereof, depending upon personal intelligence or one’s employment sector. In this case, the speaker noted that some of the power and privilege that comes from being considered “smart” or working in an academic rather than corporate setting allows individuals or groups to influence associated outcomes through either possession of a particular characteristic or employment in a particular workplace context.

An example of how control is exerted in a somewhat negative way is illustrated in this next story:

I worked in an inner-city neighborhood in a settlement house, and one of the employees had a Cuban-American wife, a therapist. She would dress up in mink and fur coats. She was overdressed. He would wear blue jeans and dress shirt and tie, blazer, clear pressed blue jeans, and she would show up like that. The point was that she was over-dressed and shutting out clients – people in poor neighborhoods.

In this case, the narrator indicates how “hair,” in the form of workplace dress, was used by an employee to place a barrier between herself and agency clients at the nonprofit settlement house. Coders’ analytic memorandums documented the various subtleties that are introduced in this story: for example, what is the basis for the storyteller’s feeling that the therapist’s “overdressed” state shuts out clients? Why was the dress of the male employee not classified as “overdressed”? Are there cultural norms associated with being a Cuban American that are influencing the female therapist’s choice of dress? And, finally, does the narrator believe the choice to “overdress” is both intentional and designed to shut out clients or triggered by a lack of awareness about how clients might perceive the unconscious messages implied by the therapist’s “dress”? Again, these questions could be incorporated within a future associated research effort.

Attractiveness and competence narratives

Baumeister and Newman (1994) indicate that people may construct stories designed to present themselves as likable and attractive. A story about being viewed as “beautiful” does not require any action on the part of the beauty. Concurrently, stories in this category may reference one’s self-worth as well as provide evidence of the self-esteem that is associated with simply being a member of a valued social group such as physicians or engineers (p. 687).

At least one or more members of the research team catalogued 37 narratives as falling into this fourth category. Of those, we found 11 narratives that used the words “I” or “we” to discuss experiences where the speaker mentioned characteristics that might enhance either their personal or group likeability or attractiveness. Another 26 narratives either made no
reference to who was involved or used words like “they” or a referenced group. An example of this type of narrative from an individual perspective follows:

[...] there’s a different culture in academia. The “wild, flailing white crown on a man […] is a symbol of his accomplishments […] this man looks disheveled […] but no one cares […] his contributions are intellectual, and I judge him on his accomplishments, not necessarily on how he physically presents himself […].

The research team found that the narratives that fell into this category tended to be more clearly linked to the original “hair” theme as promoted at the ARNOVA conference at the same time as they provided evidence of individual or collective self-affirmation. So, the story about the “wildly, flailing white hair of the academic” involves a conjunctural leap between an individual’s actual physical appearance and how that person might be seen by external others, including the speaker. In this case, the participant noted that, in her opinion, the subject’s lack of conformist “hair” was concurrently representative of his intellectual accomplishments and viewed by others in a favorable light. However, there was a notation that this characterization might be unique to the culture within the academic sector and that there might be different repercussions if the individual so described was employed in another industry.

Another example of this attractiveness affirmation follows:

When I first met this Black female colleague with graying hair, I saw it as a symbol of her confidence in herself. A woman who chooses to wear her gray hair is very attractive. It’s like she’s saying, “This is a natural progression of my aging. I have no need to mask it; it’s who I am.”

With its use of the words “confidence,” “attractive,” and “it’s who I am,” this narrative clearly contains descriptors illustrative of attractiveness and competence. The coders cited this as an example of a practice application of the balance theory in action (Heider, 1958). The balance theory posits that there are three simultaneous sentiments in any dyadic relationship: the actor’s sentiment concerning the exhibited behavior; the target’s sentiment about the same and the target’s sentiment toward the actor (Heider, 1958). A sentiment is concerned with “the way a person feels about or evaluates something. The ‘something’ may be another person or an impersonal entity” (Heider, 1958, p. 174). In this story, aging is celebrated by both the target subject and the observer-narrator: one, through the confidence associated with not hiding her age by coloring her hair and the other, through the admiration expressed for someone who has made this type of hair color choice.

Additional illustrative examples from the collected narratives are contained in Table II.

Discussion

Theoretical contributions

This project focused on a relatively under-researched audience in its data collection component engaging academics, researchers, and nonprofit/public sector practitioners who attend the annual ARNOVA conference. Persons who have worked or currently work in government, as well as for-profit settings, were also a small part of the research pool.

The questions offered to the focus groups were literal ones, developed to solicit targeted responses about experiences with “hair.” Yet, we found the responses our questions elicited were figurative. As the process unfolded, it became clear that the focus group participants had to tell their own individual stories, in their own way, before they could answer our research questions in the manner they were posed. Further, we were amazed to discover that the use of the word “hair” appeared to trigger participants’ inclination to share intimate personal narratives within a relatively short period.

Hence, we found that the storytelling dimension became a critical component of this research as a vehicle for sense-making as well as conveying the power behind what may
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<tr>
<th>Four-needs framework</th>
<th>Related themes/illustrative quotes</th>
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<tr>
<td><strong>Stories/Phrases that interpret experiences relative to objective or subjective purposes</strong></td>
<td></td>
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<tr>
<td><strong>Individual-focused narratives</strong></td>
<td>Ethnic comparison and implications: &quot;[...] My [mixed race] son was told by his new boss to ‘get rid of the beard.’ He lives in Texas. He said people think he’s Mexican and that he’ll steal. He said his beard makes a difference in how he’s treated when he walks into a store. His boss was warning him”</td>
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<td>Professional image comparison and implications: “[...] I want to talk about the notion of professionalism in the nonprofit sector [...] As it happens, we’re looking less like clients we represent [...] [it] helps get the funds [...] but puts distance between the client. In one community development organization, most staff are white [...] all dressed like business people [...] there is a disconnect with the client – even though [the organization is successful], [there’s] an inability to get people engaged [...] due to difference in how they look”</td>
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<td>Gender comparison and implications: “With men and facial hair, I think it goes back to us being animals again [...] because having a lot of facial hair says ‘I’m a man,’ and it can be very threatening, and sometimes inappropriate [...] beards are sort of seen as an assertion of masculine energy [...]”</td>
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<td><strong>Group-focused narratives</strong></td>
<td>Gender comparison and implications: “Bald men equal leadership”</td>
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<td>Gender comparison and implications: “Gray hair is seen as valued for men but not for women”</td>
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<td><strong>Stories that depict right and good actions and intentions</strong></td>
<td>Right/good intention and implications: “In the nonprofit sector, we ‘wear multiple hats’ [...] but we could change the metaphor to ‘we wear different hair styles’ because you have to have a different look based on who you’re serving [...]”</td>
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<td><strong>Stories that indicate how control is exerted over situations</strong></td>
<td>Control over the comfort/discomfort of external others and implications: “Kenji Yoshino talks about how we’re aware of how others see us/think of us/may be uncomfortable with something about us [...] are we going to cover our characteristics and make other people comfortable [...] or not?”</td>
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<td>Control over the perceptions of external others: “I had a friend who worked in the Pentagon [...] I asked her [why] she’s always dressed in dark suits all the time.” [She said] “[...] because my very presence causes so much ‘noise,’ I dress this way – to reduce the ‘noise’ so I can function in this environment”</td>
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<td>Control over the perceptions of external others: “[...] On some fundamental level, we’re animals [...] so people can say that they don’t think about hair, but they do [...] for men, if they’re gray, we usually associate that with power [...] look at shows on TV, woman are usually much younger than the men [...] long blonde hair [...] what have we done with all of our really wise women?”</td>
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<td><strong>Stories that portray the teller’s individual or group attractiveness and competence</strong></td>
<td>Positive affirmation about personal aging: “[...] if a white woman did that in academia, I don’t think it would be received in the same way. I didn’t dye my hair until two years ago; I was going gray, gracefully. But I was treated so differently. My male peers – with gray hair- were seen as the ones with information and wisdom, and they were younger [...]”</td>
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<td>Positive affirmation about age: “Before my first job interview, I put powder in my hair to give it a gray essence so that I wouldn’t be judged as being too young [...]” [white male]</td>
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<td>Positive affirmation about not having facial hair: “I think that if a beard is too heavy, it can go into the ‘aging hippie’ stereotype where it can look unkempt [...] that’s another disincentive to having a beard in many academic or corporate settings [...]”</td>
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<td>Positive affirmation about fitting in: “[...] Most people who get fired don’t get fired for incompetence, but for ‘not fitting’ [...] That’s something that a lot of us hold. Not just about doing our jobs well. Maybe it’s how people are comfortable with ourselves and our differences [...]”</td>
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Table II. Additional data examples
have initially appeared to be a simple set of questions and issues. This made the choice of methodology even more important since, as the researchers, we utilized the tool of story analysis to decode some of the implicit meanings within the stories told. This process allowed for a new understanding of how the direct and literal approach often used by social scientists to investigate the impact of attitudes and perceptions on social outcomes might best be augmented by methods that uncover the ways in which subjects frame the effects under examination within the context of their broader personal experiences.

**Practice implications**

The “hair” realities of individuals influence the ways in which they experience themselves as individuals and as members of social groups, both of which have significant workplace ramifications. The stories that were captured through this project offer insight into those lived experiences. Each day, individuals make a choice about their appearance, which includes their hair, whether it is the shape of what is on top of their heads, their facial hair, or its color. For those working in the nonprofit and public sectors, especially women and people of color, there appear to be implicit areas of concern that manifest themselves in the workplace. Ironically, one’s ability to let their “hair down” may be one of the benefits of working in these sectors as a way of better connecting with constituents and stakeholders. However, because of the need to serve multiple and, often competing audiences, this ability to identify and connect with others may have unintended consequences; consequences that may not be readily experienced in the private sector where stakeholders may have a more unified set of goals.

**Limitations**

Narrative modes of thought involve stories about particular experiences that are “temporally structured and content sensitive” (Baumeister and Newman, 1994, p. 677). The information collected for this project allowed the participants to think about situations that were joyful as well as those which might have involved minor conflicts or contradictions. Given the specific prompts, participants primarily answered the questions from the perspective of passing along information or reflecting upon the impact that their various workplace “hair” experiences have had on their present lives.

All participants in this study agreed to engage in a recorded discussion about hair and its impact on nonprofit and public sector workplaces. Invitations to participate were sent out to the entire diverse population of conference attendees. However, selection bias in this study was unavoidable, given the voluntary nature of participation and the transparency of the study’s purpose.

A clear limitation of this analysis is that the data are self-reported. The issue of self-reported data raises the question of generalizability as it relates to the findings. Another issue related to self-reported data is social desirability bias inherent to the focus group discussion process. However, it would be impossible to assess the effects of hair and image management without talking to the individuals most affected, in this case, current practitioners. Given that the so-called “subjects” of the investigation are the same persons found in the workplace, there is no way to avoid this limitation as a part of any related assessment. Rather, one may argue that this is, in fact, a strength of this research project.

**Future directions**

This project involved people who work in the USA, suggesting that we explore whether these dynamics operate in a similar fashion in other countries. Other questions that arise include whether perceptions of hair choices change over time, whether people whose appearance does not fit their organization’s norms are accepted for their choices after
some period of time, whether people who have attained some level of acceptance or power in their organizations feel freer to make different grooming choices that are inconsistent with their organization’s norms, and what leads people in an organization to accept grooming options of people who make choices that do not reflect the norm.

Future research should replicate this study with a larger group of workers in the for-profit arena to see if there are any substantive differences between the for-profit and nonprofit/public sectors on how hair is viewed and its impact on careers. One way to do this would be to attend a business conference that draws from a variety of industries. We would also want to replicate this study within a larger nonprofit and public sector population to validate whether “hair” consistently can be used as a vehicle to rapidly dissect and analyze issues that might otherwise be considered un-discussable such as stereotypical perceptions, which respondents normally might not feel uncomfortable revealing.

One’s appearance takes on workplace ramifications, whether the individuals involved desire this or not. Jobs and promotions can be obtained and lost, not always based on individual’s skills or other areas of competence, but on perceptions that may relate to how he or she chooses to handle the “hair” dimensions of their employment. Our research revealed that, for those in the nonprofit and public sectors, “hair” appears to be an implicit and contextual concern as their performance is evaluated.

References
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Appendix. Interview protocol

(1) Are there norms about hair color, style, length, etc. in your nonprofit or public sector workplace? What are these norms and how did you become aware of them?

(2) Are these grooming norms different from those you might experience in a for-profit workplace?

(3) How have your choices about hair grooming either conformed or not conformed with the grooming norms of your nonprofit or public sector workplace? Were there any conflicts between your personal hair grooming choices and the norms of your workplace? If so, what were they?
Have you ever felt you needed to modify your grooming choices in order to be in greater alignment with workplace norms? If so (a) what changes did you feel you needed to make; (b) did these changes result in some positive benefit; and (c) if so, what was the positive benefit? If you made grooming changes that resulted in a neutral or negative impact, what was that impact?

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