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Editorial

20 + 1: How Can Educational Research in South Africa Be Transformative?

Naydene de Lange, Nelson Mandela Metropolitan University

The focus of *Educational Research for Social Change (ERSC)* online journal is informed by the early work of Michael Schratz and Rob Walker (1995), *Research as Social Change: New Opportunities for Qualitative Research*. Although their work was published 20 years ago, the idea of research having the potential of being transformative, in and of itself, is still very new in many educational research circles.

In recent times, university work—worldwide and in South Africa—has been framed as teaching, research, and engagement; the last intended to dispel the notion of the university as ivory tower (de Lange, 2012) and to ensure that the university is an “engaged university,” engaging students, faculty, and communities in confronting and addressing challenges facing communities and society at large. All societies are undoubtedly confronted with diverse challenges that require deeper understanding thereof to enable their resolution. To this end, research is presented as a key tool, and researchers therefore clearly formulate a problem and research question(s), design an appropriate study, collect relevant information, do an analysis and interpretation, and offer recommendations for the key stakeholders. I often wonder how many of the resultant articles are read, and whether the findings and recommendations are ever used by relevant stakeholders to inform policies and programmes. I take an example from the field of HIV and AIDS, the field in which I do research, and refer to a study by Andrews and Pouris (2010) who indicated that, looking at the number of journal articles (both quantitative and qualitative) on HIV and AIDS published between 2005 and 2009, South African scholars published the fifth-most articles in the world—most studies being in the social sciences. Yet, despite this abundance of research, the continued increase in HIV prevalence rates in South Africa (Shisana et al., 2014) suggests that the impact of all this research is very little. So what is the problem with the research? What is it that researchers could be doing differently?

I turn to Shratz and Walker (1995) who asserted that the complexity of problems, in particular those researched by social scientists, require researchers going “beyond some competence in sampling, questionnaire design and being able to manipulate and present figures” (p. 4), and to see their “involvement in research as providing them with new possibilities for [social] action.” They pointed out that their “inclination is to seek to understand situations as participants see them rather than as theory might suggest and to recognise that once we start to study them we inevitably become part of the situation ourselves, not apart from it” (p. 2), which provides the “opportunity to become more reflexive in . . . practice (p. 1).” They continued that they, in their work, “have tried to suggest ways of doing research that we have found engage people’s interest and enthusiasm and which often has led to new ways of thinking, new possibilities for action and sometimes a new sense of direction” (p.

4). It is this kind of research, which enables social action and positive change that social scientists should be exploring, and which is also the kind of research that the *Educational Research for Social Change* journal encourages and publishes.

Researchers in the field of educational research—from universities in South Africa and abroad—have indeed taken up “new ways of thinking” about research that have opened up “possibilities for action” as Schratz and Walker (1995, p. 4) suggested (see the many articles in previous issues of *ERSC*). Thus, they have found ways to:

contribute towards making a difference in the lives of people in the communities that universities serve . . . [and,] drawing on research methodologies of a participatory nature . . . [allow] academic researchers to engage with the communities they serve and to take up their social responsibility. (De Lange, 2012, p. 4)

Such research, which has an activist and interventionist agenda in and of itself, is seen as critical in contributing to a transformation agenda.

Clearly, *ERSC* journal is creating a space for research for social change, but this is in the context of a higher education landscape that pressures researchers to publish or perish. This seems to encourage researchers to choose the quickest way of doing research, collecting data for analysis, and publishing it in a peer-reviewed (and accredited journal) so that their university can draw the subsidy from the Department of Higher Education and Training. While this is seen as contributing to the relevant bodies of knowledge, it often leaves the participants who provided the data in the same situation as they were before the research—even though a firm set of recommendations to key stakeholders may have been offered. Participatory research that aims to enable social change takes longer because it requires earnest negotiation to gain access to the participants in the particular community, an extended period of working with the participants, lengthy data generation sessions, participatory analysis, and shared dissemination. The benefit, however, is that the findings are immediately available to the participants, the process in itself is often an enabling one, and participants themselves are able to take action and do something about the issue under scrutiny. Participatory research is not without critique, and requires thoughtful engagement with the participants from the outset of a study working towards achieving “participatory parity” (Fraser, 1997).

Past themed issues of *Educational Research for Social Change* have foregrounded choice of paradigm and methodology that promote social change, for example, the themed issues on action research and its transformative potential, arts-based methodologies in addressing HIV and AIDS and the difference they make, and the importance of enacting reflexivity in educational research. Other themed issues have focused on specific fields and areas where a deeper understanding could contribute to social change, such as the themed issue on information and communication technologies and educational change, and intercultural education as culturally responsive education. The last issue focused on the importance of descending from the ivory tower, and community engagement for mutual learning. Clearly, these themed issues encourage researchers and their postgraduate students to rethink their doing of research in a way that indeed contributes to the social change needed worldwide.

This eighth issue, “20 + 1: How Can Educational Research in South Africa Be Transformative?” (21 years into democratic South Africa), continues the work presented in the earlier issues—and makes further contribution to the theorising of educational research for social change. Five scholars—all

experts in their respective fields—were invited to draw on their rich and deep experience of conducting research and supervising research students to frame arguments that would contribute to the theme of the issue.

They were asked to consider such questions as:

- What is educational research for social change? How might we push research as social change further and deepen our understanding of research as social change?
- What does scholarship for social change mean? Who decides what it means? What are its possibilities and its limitations?
- How do we encourage socially engaged scholarship?
- How might research be democratised? Why should research be democratised? What are the possibilities?
- Who may produce knowledge, own knowledge, and disseminate knowledge for social change? How might we challenge dominant and privileged ways of knowing?
- How might we encourage postgraduate students to undertake educational research for social change?
- How can our research influence policy makers and inform policy making?
- How might new modes of representation (such as screenings, exhibitions, and the use of digital technology) contribute to new frameworks for educational research as social change?
- How can we challenge the gatekeepers of research in higher education through educational research for social change?

The articles together encourage readers to rethink the historical and current contexts of the university, the core tasks of the university, what socially engaged scholarship means, the knowledges that are produced and how they are produced, the ways in which such knowledges are disseminated, and how the contemporary higher education landscape persists in promoting a certain kind of knowledge that continues to reproduce inequalities that are not to the advantage of the communities the universities serve. They do, indeed, offer food for thought!

INVITED ARTICLES

Articles were invited for this special edition from the following authors:

- Crain Soudien
Looking Backwards: How to Be a South African University
- Enver Motala
Public Scholarship, Democracy and Scholarly Engagement
- Relebohile Moletsane
Whose Knowledge is It? Towards Reordering Knowledge Production and Dissemination in the Global South

- Claudia Mitchell
Looking at Showing: On the Politics and Pedagogy of Exhibiting in Community-Based Research and Work With Policy Makers
- Keyan Tomaselli
Hacking Through Academedia: Autoethnography, Data and Social Change

The first article, “Looking Backwards: How to Be a South African University” by Crain Soudien, offers an important take on the early days of the South African university, enabling the reader to engage with his argument of the centrality of “race” in the university, then and now, and how in spite of being contested by some, it continues to shape the agenda of the university. Soudien cleverly builds his argument using the notion of “perverse ambivalence” as organising concept. He argues that it is difficult to stop the momentum of “whiteness” as a “meaning-making paradigm” and the continual injustices it produces. The need for, and urgency of transformation, however, positions it as “a site of work.” In terms of the theme of this issue, this article enables understanding of how race shapes the core agenda of the South African university, its curriculum, and its research agenda, and how what is understood as “good research” emanates from the project of white supremacy.

“Public Scholarship, Democracy and Scholarly Engagement” by Enver Motala, complements Soudien’s paper in furthering the argument that conventional (and colonialist) approaches to the production of scholarship is limiting and might not optimally serve the broader purposes of science as an intellectual and social activity. Motala argues that scholarship emanating from academics and communities engaging with each other, co-constructing knowledge, has greater social purpose and should be intrinsic to the core business and role of the university. Such scholarship, however, is not readily accepted as good research, with the researcher’s work often being marginalised. As such, he argues that scholarship should be expanded to be understood as socially engaged scholarship, which, when working with communities—also marginalised communities—has implications for which research traditions, paradigms, methodologies, and methods are privileged as modes of inquiry, representation, and dissemination.

Relebohile Moletsane, in her article entitled “Whose Knowledge is It? Towards Reordering Knowledge Production and Dissemination in the Global South,” picks up on the arguments of the two previous articles, and questions the power inherent in knowledge production and, therefore, whose knowledge counts. Her question of how social sciences and humanities researchers including education scholars and activists, in general, and those in the Global South, in particular, might advance the troubled and troubling knowledge they encounter in their work, and how might their work contribute to social change in the institutions and communities they work with, encourages readers to think about the possibilities of “reordering knowledge production and dissemination” so as to take into consideration that which is local and indigenous and which could contribute to social change. While several educational researchers in South Africa are beginning to explore participatory methodologies, and locating their work in a critical and transformative paradigm, a critical mass of this kind of research could contribute to the transformation of the university—its curriculum, its research agenda, and its engagement with the communities the university serves—and also to the transformation of society.

Claudia Mitchell’s article, “Looking at Showing: On the Politics and Pedagogy of Exhibiting in Community-Based Research and Work with Policy Makers,” links to the Soudien, Motala, and Moletsane articles by exploring the kind of research universities should undertake to contribute to social change. In this conceptual paper, drawing on examples from her community-based

participatory research, Mitchell explores the importance of exhibiting research for participants and audiences to see and engage with. She develops the argument in her paper around the idea of “circulating the vernacular” to explain the process of exhibiting the work in different sites and to different audiences—enabling dialogue. She presents the example of an exhibition emanating from a community-based research project, and how it was used to engage audiences and policy makers to see for themselves the need for change, as well as the possibilities for change. Mitchell’s article makes an important contribution to the theme of educational research contributing to transformation by offering a tentative framework for studying exhibiting, and engaging audiences in social science research that can make a difference.

In the final article in this collection, “Hacking Through Academedia: Autoethnography, Data and Social Change,” Keyan Tomaselli challenges what counts as research in higher education, and who gets to decide what counts. This links to the argument Soudien put forward, pointing out how difficult it is to disrupt the influence of whiteness that still lingers and influences what counts as good research. Using autoethnography as methodology, Tomaselli employs his own experiences of researching and publishing to connect the personal to the cultural and then to the political, pointing out several areas to be contested if we “want to build a more inclusive polysemic dynamic humanities [and social sciences] that responds to the myriad of contexts in which the diversity of multicultural generations now find themselves.” He offers a “new imaginary” as a way forward suggesting that academia be “all-inclusive, democratising, useful, generating employable (critical) graduates; engage in critical and indigenous methodologies; and examine the commodification of the academic enterprise.”

STUDENT ARTICLES

The issue also includes two articles by postgraduate research students:

- Kimera Moodley, with Angela James and Michelle Stears
Reflections of a Novice Academic Writer
- Ying-Syuan Huang
Integrating Reflexivity: Negotiating Researcher Identity through Autoethnography

Two articles by postgraduate research students arrived unexpectedly at the *ERSC* journal office and have been included in this issue because they, serendipitously and in different ways, speak to key points made in the invited articles.

“Reflections of a Novice Academic Writer,” by Kimera Moodley with the support of her supervisor, Angela James, and mentor, Michelle Stears, describes the experiences and reflections of a student writing her first article for publication. It lays bare the writing and rewriting process, and anguish and frustrations of “getting it right” in order to gain access to the academic writer fold. In 2015 circumstance of student protest against economic exclusion or gatekeeping, Moodley points to another less visible gate—the art of academic writing. As earlier articles argue against the gatekeeping of who may be considered worthy of contributing knowledge, so Moodley shows the difficulties (and rewards) of having to learn how to comply with conventional methods of disseminating (through academic publishing) that knowledge.

Ying-Syuan Huang’s background places her astride indigenous knowledges and modern education. She writes about how, in her research, she was confronted with the tensions between Confucian

learning traditions and new Western reform initiatives. Her article, “Integrating Reflexivity: Negotiating Researcher Identity Through Autoethnography,” explores her identity as researcher by interrogating internal tensions experienced in her inquiry about science education transformation in Taiwan: “When I came to Canada as a Taiwanese learner, I became aware of the influence of one’s cultural heritage on their epistemic practice. . . . Through reflexivity, I entered the process of negotiating between my cultural experience and my research inquiry.” While the article does not speak directly to a South African context, it does throw light on a dilemma indigenous South African students might face, and also demonstrates how a reflexive methodology enables a deeper understanding of the inherent tensions of transformation and of self.

I invite readers to consider these two articles in the context of central ideas offered in Soudien, Motala, Moletsane, Mitchell, and Tomaselli’s articles, and make further connections for themselves.

CONFERENCE REPORT

The conference report on the 2015 Sexual Violence Research Initiative (SVRI) Forum, bringing together university scholars and several researchers in the employment of NGOs, describes the space SVRI created for dialogue around understanding and addressing sexual violence—as the SVRI pointed out, particularly in “resource poor” and “low- and middle-income countries.” The report highlights the interesting keynote papers, oral presentations, posters, and visual work, but points out that here too, the way knowledge is produced, represented, and disseminated is troublesome. I concluded the report by asking: “If we had heard the voices of the women and girls on the ground, how might that have contributed to our deeper understanding of addressing sexual violence in South Africa, Africa, and the rest of the world?”

BOOK REVIEW

Knowledge as Enablement: Engagement Between Higher Education and the Third Sector in South Africa (edited by Mabel Erasmus and Ruth Albertyn), as Anne Harley and Mark Butler point out in their book review, makes an important contribution to the under-studied field of community engagement (CE) by opening a much-needed conversation and starting from a point that problematises the field. The reviewers highlight the possibilities of the book contributing to the transformation of the work of higher education institutions but critique the slippages in the use of language around community engagement, the exclusion of important social movement voices, the relations of power and representation, and the reinforcing and reinscription of inequalities and injustices that would reproduce that which CE is actually aiming to address. The book review contributes to the themed issue by prompting researchers at higher education institutions to think critically about knowledge production in service of transformation.

I believe that every piece in “20 + 1: How Can Educational Research in South Africa Be Transformative?” in different but interesting ways, opens up the space for us, as scholars, to engage critically what “our doing does” (Foucault, as paraphrased in Dreyfus & Rabinow, 1992).

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Looking backwards: How to be a South African university

Crain Soudien

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Abstract

In this paper, I argue that the contemporary South African university cannot be understood and engaged with outside of an appreciation of its constitutive beginnings. "Race" is central to these beginnings but how it takes form, is worked with and deployed in the university is, to be historically accurate, not a deliberate teleological project. The approach I take in this work is to see it rather as a site of perverse ambivalence. I argue that this ambivalence is unable to impede the momentum of "whiteness" as a sense-making paradigm in which the university is to operate. It is not, however, a totalising apparatus. Contestation surrounds it, even in its most powerful moments. I suggest, in terms of this, that even as white dominance deepens there continue to be agents who both reflect on and act critically on the circumstances in which they find themselves. The first part of the paper provides a brief description of the inauguration of the higher education system. A second looks at the social conditions in which this inauguration played out. A third part then looks at how the universities in their engagement with this social context responded in determining who should come to it and what should be taught. Flowing from this, the paper closes with preliminary thoughts on how the South African university might begin to address its constitutive challenges.

Keywords: South African higher education, race, class, the sociology of knowledge, access

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Professor Crain Soudien is the Chief Executive Officer of the Human Sciences Research Council and formerly a Deputy Vice-Chancellor at the University of Cape Town. He is a joint professor in Education and African Studies. He has published over 180 articles, reviews, reports, and book chapters in the areas of social difference, culture, education policy, comparative education, educational change, public history and popular culture. He is also the co-editor of three books. He was educated at the University of Cape Town, South Africa and holds a PhD from the State University of New York at Buffalo.



Introduction

Recent protests at South African universities around the question of “race” and identity, particularly as they relate to the question of transformation at the Universities of Cape Town, Stellenbosch, and Rhodes, have brought into sharp focus the debate about the future of the university. What is the new South African university to be? How does the South African university work with its legacy—to continue where it is already engaged in socially transformative work, to begin new initiatives to transform itself in places where it is struggling, and to develop an agenda that shows clearly how it understands itself in relation to the social context in which it finds itself?

In this paper, I argue that the contemporary South African university cannot be understood and engaged with outside of an appreciation of its constitutive beginnings. Race is central to these beginnings. But how race takes form, is worked with and deployed in the university is, to be historically accurate, not a deliberate teleological project. It is not the case that every domain of knowledge in the university is inscribed and motivated by the racial conceits of “whiteness.” Necessary, therefore, as it is to acknowledge the deep racial influences that permeate the beginning of the South African higher education system and the persistent injustices these produce, the approach I take in this work is to see the early moments of the university in South Africa as structured in perverse ambivalence. Perversity follows almost every inflection of the making of the university system. The hallmark of this perversity emanates from the dominance of the racialised (white) elites who oversee the establishment of the university in South Africa. They come to see the university as a vehicle for the reproduction of their social and racial superiority. In making this the point of departure, my article begins with the proposition that race is never neutral. As a concept, it is inherently incapable of yielding anything but harm. In splitting humans into types it insistently, and arbitrarily so, distributes worth in always discriminatory ways. It is, however, always ambivalent. This ambivalence flows directly from the fact of its speciousness. Its speciousness makes it such that it is always in search of explanations. There is, about it, nothing that is either self-evident or self-explanatory. It cannot explain itself. It always has to be theoretically accounted for, from its initial ideological animations, which claim for whites superiority of both mind and body, through to its deployment in the changing socioeconomic contexts in which it is present, to its invocation and enunciation as a category of analysis. In none of this is it able to explain itself. It always requires, to justify itself, one explanation or another. As such, I seek not to use it symptomatically in this contribution. I argue, instead, that it is a site of work. This article focuses on the beginning moments of the university in South Africa’s engagement with the idea of race, and the ways in which this engagement shapes the core agenda of the university, particularly its research agenda.

The historian Saul Dubow (2006), who has written extensively on the racial character of the scientific project in South Africa, made the important point that regionalism, by which I assume he means place and context, is a “rather neglected aspect of the politics of unification” in the making of the Union of South Africa (Dubow, 2006, p. 7). He also said that “the hairline cracks that it left . . . can be readily detected in the complex internal histories of institutions such as museums, botanical gardens, and especially universities where conflict between ‘broad South Africanism’ and Afrikaner nationalism became acute” (p.7). I build on that approach in this paper to include into the idea of hairline cracks, the conflicts over race and class too, and argue that these constitute the new South African university in a state of internal ambivalence. Following the argument I make immediately above, this ambivalence is unable to impede the momentum of whiteness as a sense-making paradigm in which the university is to operate. It is not, however, a totalising apparatus. Contestation surrounds it, even in its most powerful moments. I suggest, in terms of this, that even as white dominance deepens, there continue to be agents who both reflect on and act critically on the circumstances in which they find themselves (see Beck, Giddens, & Lash, 1994). That they do so in immensely complex and even contradictory ways is what comes to give the South African story of

higher education its particular interest. In contrast to facile renditions of the character of this system as a long-range project of dominance, structured in singularity and homogeneity (see, for example, Kasibe, 2015), the approach I take here is to acknowledge its constitutive ambivalence (see Hendricks & Vale, 2005). While the system is in an often complicit articulation with its broader social order, even as it largely reproduces this order, it does so in ways that provide opportunities for the instantiation of alternative ways of being, doing, and thinking critically.

The first part of the paper provides a brief description of the inauguration of the higher education system. A second looks at the social conditions in which this inauguration plays out. It seeks to put into perspective the dynamic nature of the social formation of the country. A third part then looks at how the universities in their engagement with this social context responded in determining who should come to it, what should be taught, and what should be researched. Flowing from this, the article closes with preliminary thoughts on how the South African university might begin to address its constitutive challenges.

The Beginnings of the South African Higher Education System

It is important, for the record, to point out that the story of higher education in South Africa has a time line that is roughly coterminous with those of its sister colonies of New Zealand, Australia, and Canada. The establishment of higher education institutions in the English-speaking world, especially those parts where English-speaking settlers came to put down roots, comes in the wake of the rapid class formation one sees in these countries. The first universities to be established in the Antipodes were the University of Sydney in 1850 in Australia and the University of Otago in 1869 in New Zealand.

It would only be in 1873 that the first autonomous degree-granting institution would be established at the Cape, the University of the Cape of Good Hope (UCGH), later to become the University of South Africa. Even though the UCGH was established 23 years after the founding of the University of Sydney, it came to support, in terms of its accreditation responsibility, a higher education network that had been going for many decades already. This network began with the founding of the South African College School (SACS) in 1829, an institution that was both a high school and a university college that prepared students for the examinations of the University of London in the United Kingdom (Lulat, 2005; Maharajh, Motala, & Scerri, 2011). This was followed by the establishment of university-level facilities at institutions such as the Stellenbosch Gymnasium in 1866, and then Gill College in 1869 in Somerset East, Grey College in Port Elizabeth, and at the Graaff-Reinet College around about 1861 (Boucher, 1975), Diocesan College in Cape Town in 1874 and later, St Andrew's College in Grahamstown in 1878 (Buckland & Neville, 2004, p. 2). Important for the narrative record about this network is that not all these institutions were able or allowed to continue their higher education functions beyond the turn of the 19th century. These functions were entrusted to a small number of institutions between 1874 and 1916, namely, SACS and Victoria College, the successor to the Stellenbosch Gymnasium, itself later to become Stellenbosch University in 1918. In 1896, a School of Mines was established in Kimberley but was transferred to Johannesburg in 1903 as the Transvaal University College (TUC). TUC changed its name in 1910 to the South African School of Mines and Technology and, later, would be incorporated as the University of the Witwatersrand in 1921. The name, Transvaal University College, was transferred to a new institution established in Pretoria in 1910 (Maharajh et al., 2011). This institution was to be formally upgraded to the University of Pretoria in 1930. The Rhodes University College was established in 1904 (Buckland & Neville, 2004), as was Grey University College (see <http://www.ufs.ac.za/about-the-ufs/ufs-in-focus/brief-history>). The Natal University College was set up in 1909 (Maharajh et al., 2011).

The evolving society into which the new university system came

Telling the story of these institutions simply in terms of their chronologies, however, misses the point about their significance. Their significance lies in and against the social context in which they found themselves. The South African situation at the turn of the 19th century took its dynamic, at one level, from the struggle between Afrikaans- and English-speaking South Africans. One sees this, for example, in the struggle over language in the major institutions. Much of the narration of the evolving system has focused on this language divide and, of course, that language divide carries with it important sociocultural orientations that result in real differences between the historically white Afrikaans universities and the historically English universities of the apartheid period. But the dynamic that needs more serious attention was, at another perhaps more fundamental level, about how institutions came to situate themselves in relation to processes involving the distribution of privilege and power. How did they manage themselves as modern knowledge producing institutions in a society in which the vectors of class, race, and gender were simultaneously so compellingly powerful and yet, strikingly, so incomplete and even contested in their formation and enunciation? Building on the work of Dubow (2006), I make the argument here that the emergent South African higher education system comes to be recruited behind, and to play to an important degree an authorising role in, what I shall call a complex race–class project. It does so, however, ambivalently.

In coming to terms with the idea of ambivalence, it is important to emphasise that the society of the mid-1800s, when the idea of the university in the country was beginning to arise, was at that point by no means completely settled on the question of race. Class, to be sure, was less of a question of contestation than it was in the city of Cape Town itself. There was no question in virtually everybody's minds that that the image of the so-called refined upper-class gentleman, already a distinct figure on the South African social landscape, contained the ideal towards which the machinery of civilisation should work. But the modalities for getting to the making of this ideal, its content and representational strategies, were not so easily activated. The growing town of Cape Town demonstrated the challenge clearly. In the 1890s, as the Cape political elite came to the point of seeking to institute segregation in schools, the social conditions that they found on the ground were complex. This is usefully illustrated in the proceedings of a Commission of Enquiry into the possibility of establishing separate schools for children of colour (Cape of Good Hope, 1891). At this Commission of Enquiry, the Reverend T. Lightfoot, Archdeacon of the Cape, provided a little-known insider's view of the society in which he operated (all the responses in italics below are his):

Sir Langham Dale (a member of the Commission) said to Lightfoot that he felt that it was desirable to draw a line between white children and children of colour and proposed a new class of schools for white children (fourth class undenominational schools). "Do you agree with that?" he asked.

I do not see how you can limit it to the purely white. There are cases where a man has married a woman who is a little off-coloured, and in their family, one child, will take after the father, and another, by curious law of reversion, will be more coloured than the mother. . . . In Cape Town I do not think you can draw a line of distinction in the matter of colour.

Dale: Is not the effect of having coloured children mixed up with whites prejudicial?—

No, I do not think it is in Cape Town; they are so thoroughly mixed together in daily life. . . . The managers ought to have some other reason for excluding besides purely colour.
(*Cape of Good Hope, 1891, pp. 59–60*)

Important about this picture painted by Lightfoot is the fact that the everyday social culture of the Cape, especially amongst its working classes, had within the variety of social, cultural, religious, and economic imaginations at its disposal, a real inclination to a trans-race position. It was against the possibility of this disposition deepening that the political elite of the Cape felt they had to act. Confronting them, moreover, was not just the visible example of the everyday but also the argument of the liberal lobby for a nonracial franchise. With the Cape having just abolished slavery, there were elements amongst its political order in the early 1800s, even conservative ones such as John Fairbairn to whom reference is made below, who were very mindful of the rights of all its subjects. In a “Memorandum . . . for the Advancement of Education at the Cape” to the Cape government for the appointment of the system’s first Superintendent-General, he urged that it should choose a person who would be “able to estimate at their practical value, or rather at their *real nothingness*, with respect to his office the microscopic differences of colour, Nation, Language, Rank and the Sectional distinctions of Religion” (Kies, 1939, p. 22; see also *Cape of Good Hope, 1854, pp. 32–33*).

This liberal mindfulness, however, was displaced, over a period of approximately 50 years by a crude form of white racial anxiety. By the time the outlines of a national higher education system had begun to emerge towards the end of the 19th and at the beginning of the 20th century, the idea of race had solidified in the nascent country’s political imagination. James Rose-Innes at the start of this 50-year period, however, opened the possibility for a different path to be taken in the Cape.

Rose-Innes’ successor, Langham Dale, deliberately moved the educational system away from the possibility of this openness. When he took over the Superintendent-Generalship, he made clear in his very first annual report in 1860 that not only was he concerned about “the mixture of the sexes in so many of the established schools,” but that he was *alarmed* at “the greater or lesser intimacy into which European children, especially in the country, are thrown with the unrefined nature and habits of the native calls us to be watchful in regulating and maintaining a proper standard of morality” (*Cape of Good Hope, 1860, p. 5*).

This attitude taken by Dale marked a decisive moment of change in the discursive economy around race. Firmed up in the conventional wisdom—the popular sociology—of South Africa was a racial certainty that had earlier been, speaking colloquially, on the back foot: people of colour were inferior by nature. Why this shift happened so decisively requires a great deal of unpacking. To do so would need a much closer analysis of the structural and the social factors taking shape in the Cape and in the rest of the country. But there is no doubt that the mineral revolution through which the country was going fundamentally altered the balance of forces. After the discovery of gold and diamonds, the country rapidly divested itself of its formal commitment to openness and began to institute the practice of formal segregation in public life and particularly in education (see Simons & Simons, 1985). Dale and Rhodes, for understanding the politics of education, were pivotal in this process. Dale was the Superintendent-General of Education at the Cape until 1892, and Cecil John Rhodes Prime Minister of the Cape Colony at the same time. They came to play important roles in the establishment of the colleges and incipient universities that emerged in the country. Dale saw the university’s purpose in narrow terms. He expressed himself against the “cosmopolitan view [which] carr[ies] no little popular favour” (Kidd, 1910, p. 42). Instead, he argued, the university should seek “the cultivation of an enthusiastic attachment to hearths and homes [and] to guide the destinies of the embryo African nationality” (1910, p. 42).

This nationality to which Dale appealed, however, was anything but African. It was premised on a political reading of the evolving society, which was acutely aware of the dangers that a united working class of people of colour and white people constituted for the emerging capitalist order (see Beinart, 1994, pp. 68–69). In order to understand this reading it is important to make clear what this new order constituted. The country was not unified yet. The Cape was politically separate from the Afrikaner republics in the north. Critical in the English-speaking elite's imagination, however, was the question of the economy and its sustainability. In this imagination, and particularly for bureaucrats and politicians such as Dale, "race became an increasingly important category of social thought and races were ranked in a supposed hierarchy of civilization" (Beinart, 1994, p. 68–69). The idea of race provided the justification for how the defining conditions of prosperity in the country could be maintained. It was Rhodes who understood how necessary the supply of a cheap labour source was for the ongoing prosperity of the new society. As No Sizwe (1979, p. 34) argued, "the discovery and exploitation of diamonds and later gold (meant) that there was a giant leap in demand for labour." Growing rapidly, as the white working class had in this time, it was not going to provide sufficient numbers of workers for the economic revolution unfolding in the country. To resolve this problem, the "native," Rhodes would say, had to be taught the "dignity of labour," and so he instituted the Native Reserve system that pushed African people off the land, herded them into reserves, and demanded from them the payment of a labour tax. The reserves enabled these people to maintain a small subsistence capacity but not enough income to pay their taxes. For that, they had to join the labour pool. While scholars such as Beinart (1994) argued that the proletarianising effects of the Glen Grey Act, which was responsible for the establishment of the reserve system, are exaggerated, it is nonetheless correct that Rhodes and the aggressive capitalists around him were influential in yoking the idea of race behind the class project of the emerging South African state. In terms of this, it was crucial that he and his administrators such as Dale did everything in their power to ensure the development of the labour pool in the country. Pivotal in this process was education. People of colour could not be afforded the opportunities that were being made available to white people. They had to be directed towards the labour market. The new African nationality in this vision had to be based on an essentially united white identity. The universities, for people like Rhodes, were central to this project.

How this project unfolds, however, is by no means linear or without contestation.

The Constitutive Openness of the South African University

As was the case in Australia and New Zealand, the South African higher education system took its form from the complex amalgam of desires, ambitions, and grievances that developed in the political orbits of the colonies. On the one hand, there was the ambiguity of the nascent country's relationship with Europe. The image of *motherland* Britain loomed large in the politically hegemonic English-speaking white settlers' imaginations. So too, however, did the aspiration to be independent of it. On the other hand, the conditions of conquest in the region, of Brit over Boer and of white over black, placed everybody in a tumult of anxiety. The rapidly industrialising landscape produced the kinds of class profiles one would see in other capitalist economies, but, as explained earlier in the discussion around Dale and Rhodes, the conditions of production on the mines, essentially those primed by the need for cheap labour, inflected these formations in racial terms. Exploitation of cheap labour required a justification. It was out of this that the South African race discourse was to firm up. The justification amounted to an approach to what it meant to be inferior and superior that began in the "look" of the body but, as science failed to prove the inferiority of the black body, evolved into a discourse about culture. In relation to this, it is important to acknowledge how much these first South African higher education institutions, in some ways more so than their counterparts elsewhere in the English-speaking world, take their sense of themselves, their mission, and purpose, from the exigency surrounding this social question. In this exigency there was, often but not always, a

disposition towards an openness on the part of the professoriate against a racial-closed-mindedness on that of university councils. The university councils would most regularly come to prevail. Representing the political mood of the period, it is largely from the decisions that they made that the image of the South African university as a colonial university is born. Every step of the way of this white supremacy, however, was characterised by ambivalence. Against the position that these councils came to represent, there were individual academics and administrators who articulated the urgency for the need of an alternative and open approach to thinking about the university (see Greyling, 2007; Hendricks & Vale, 2005; Oosthuizen, Clifford-Vaughan, Behr, & Rauche, 1981).

What were the sources for this ambivalence? Predictably, the new institutions imbibed much of their ethos and character from the high-minded discourse of the role and purpose of the modern university that was beginning to circulate globally. Local as the founding fathers of the universities were, they themselves could not be the knowledge patricians on which the institutions would come to depend. They had to bring in from outside South Africa the first wave of academics the country required. These academics, not unexpectedly, brought with them the debates and the controversies that were being played out in the places from which they came. Powerful in these debates were, on the one hand, people like Cardinal John Newman (1854) and his *The Idea of a University*, and, on the other, the thinking coming out of the Humboldtian revolution. In the Newman discourse, these academics would have been familiar with and would have articulated the idea that the university was meant to be a “place of concourse, whither students come from every quarter for every kind of knowledge” (Newman, 1854, section 15). The university would be for them, in this framing, a generative social force, stimulating social and cultural formation. In the Humboldtian vision the idea was to yoke the university behind the pursuit of new knowledge to further the grand goals of progress. Science, knowledge, mattered in this vision. These ideas were to have deep resonance in the emergent South African academy, and would come to shape notions of academic freedom and the university as a vehicle for progress. When the discussion for the establishment of the University of Cape Town (UCT) began, for example, there was a pervasive concern about the need for a modern university that would respond to the growing economic and industrial revolution through which the region was going. All the higher education initiatives that came into being by the beginning of the 20th century carried, in the way they set up their formal charters and in the appointments of their first and founding academic members of staff, all the commitments to science and social progress one sees in the major universities elsewhere in the world. The first principal of the University of Cape Town, established in 1918, John Carruthers Beattie, explained that his new university:

would deliberately provide a broad undergraduate education to overcome the narrowness of school curricula and that at post-graduate level it would embark on research with a will: ‘No University was worth the name which did not make that one of its chief objects.’ (as cited in Phillips, 1993, p. 6)

The Constitutive Closedness of the South African University

The architects of the new country that was beginning to take shape, such as Rhodes, saw the university in a very particular light. The role of a university would be to build the nation by nurturing in young *men* the idea of being:

tied to one another by the strongest feeling that can be created. . . . these young men would go forth into all parts of [South Africa] prepared to make the future of the country, and in their hands this great question of union could safely be left. (Kidd, 1910, p. 42)

Clear in this imagining of the university was the patriarchal and masculinist idea and, indeed, place of the university in building the new South African nation. The university that he envisaged was to be placed at the service of the emerging white nation. How was this done? Two formative elements of this process are crucial and need to be explained. The first relates to who was allowed to come into the university, and the second to what the universities chose to privilege in what they taught and began to think were worthy questions of further investigation through their research.

The first five institutions that were established entered their lives as white institutions. In clarifying this question of race for themselves, interestingly, they were much more liberal-minded when it came to gender. Virtually all the institutions began to admit women early on in their histories. But they were unbridled defenders of a white sensibility. The examples of SACS (later to become the UCT), and the University Colleges of Rhodes and Natal exemplify this. Their admissions practices, formal policies not yet in use, were unequivocally discriminatory. SACS, and this is important in the institution's narrative, had begun its life fully committed to an open approach. This ethos was a deep part of the institution's self-understanding. But it was systematically undermined and ultimately eroded by Dale and his successors. The effect is that none of the institutions was able to commit itself to the high-minded openness professed by some of its members. The story of Harold Cressy, the first person of colour to be admitted into a South African higher education institution, is instructive. Cressy had applied to and secured admission to Rhodes University College in 1909. Having gained through private study the Intermediate Bachelor of Arts certificate, and with a bursary from the Cape Education department, Cressy applied to the Rhodes University College. Mohamed Adhikari (2012, p. 18), Cressy's biographer, wrote that "Cressy set out for Grahamstown. There he intended to fulfil a burning ambition. . . . One can readily imagine Cressy's anguish and frustration, when university officials, upon seeing the colour of his skin, summarily rejected his application." Interestingly, neither the history of Rhodes University by Buckland and Neville (2004) nor the critical study by Greyling (2007) makes reference to this important episode in the institution's history. Rhodes University College saw its role in the education of people of colour as putting its weight behind the establishment of South African College of Fort Hare, known as the South African Native College, and later as the University College of Fort Hare. Cressy himself, supported by the politician Abdullah Abdurahman, decided to apply to SACS. As Adhikari (2012, p. 19) said, "after much deliberation, and in the face of strong opposition within its ranks, the Council of the South African College finally decided to admit Cressy." The Council would meet twice over a period of a month to come to this decision. Despite the constitution of SACS, which made it clear that "the departments of the College are open without restriction as to creed or colour to all applicants," important members of the College's Council such as F. J. Centlivres and W. T. Buissine argued that it "would be detrimental to the interests of the South African College to admit coloured scholars" (Adhikari, 2012, p. 16). Buisinne would write to Rhodes University College to establish that they had rejected Cressy's application.

The breakthrough Cressy had achieved at SACS, strikingly, would not be repeated in the country until the 1920s when the University of Cape Town again found itself having to make a decision about admitting students of colour. Phillips (1993, p. 114), a historian of UCT, quotes a minute of a 1923 meeting of the university's Council, which stated that "it would not be in the interests of the university to admit native or coloured students in any numbers, if at all." He went on to say the following:

This it was felt was especially true with regard to its medical course, which was closed to blacks lest it lead to mixed classes and white patients being examined by black medical students. . . . A similar bar was put on Fine Arts courses in which white models posed for black undergraduates. . . . The handful of 'coloureds' who were admitted to UCT in these

years . . . were mainly teachers registered for Arts or Education degrees. Up to 1929 five had graduated. . . . As difficult as blacks found it to get into UCT in the 1920s, so it was easy for white ex-servicemen to gain admission. Generous scholarships were offered to them. . . . UCT also tried hard to ensure that able but impecunious white students would not be denied entry through lack of funds. (1993, p. 114–115)

The other institution in this trio of higher education establishments, the University College of Natal, had before it in 1916 an enquiry from a Mr Wahed, “an Indian resident at Pinetown . . . regarding admission to University classes” (Brookes, 1966, p. 43). The institution’s Council replied that it was “not prepared to entertain the proposal” (1966, p. 43). When it received a second application from another “Indian” applicant in 1921, despite some members of the Council invoking the spirit of Newman, the applicant was turned down and referred to the College of Fort Hare (1966, p. 43). It would take an order of the court in 1926 with the threat that it would issue an instruction for the withdrawal of recognition of the institution’s status as an institution of higher education for the college to admit its first two students of colour in 1926. The way in which this order was implemented was to establish a parallel class in the college for students of colour (1966, p. 44).

Physically debar students of colour as these early institutions did, it is also how they came to structure their curricula, which it is important to understand. What did these new institutions teach?

The Curriculum of the New Universities

Why is it important to make an issue of what these first institutions chose to teach their young subjects? It is important in so far as it gives one a sense of what they valued and, in shaping the leadership of the country, what they thought students should know.

To understand the curriculum, and to hold on to the idea of ambivalence I am seeking to use as a motif, how were the ideas of *openness* and *closedness* evident in the curriculum? With respect to openness, almost predictably, the character and range of disciplines that were prioritised in the first institutions were not unlike the institutions in the United Kingdom. It is a matter of some interest that the first wave of intellectuals drawn to the country were from the long established universities of Scotland, Edinburgh, Glasgow, St Andrews, and Dundee. This continued a pattern of intellectual migration established by SACS. Phillips (1993) explained that of the first 42 men who took up chairs at UCT between 1918 and 1929, there were no women and only seven were born in South Africa. When the Natal University College was started in 1910, it had a total of eight professors. Five of these came from the United Kingdom and three from South Africa (Brookes, 1966). At Rhodes, the four “founding fathers” were all born outside the country. Three of them were English and all of them were educated in the United Kingdom. While it is interesting that these “founders” of the nascent South African university system were largely British, of more significance is what they taught.

In understanding what was taught, it is important to be clear about what the founding professoriate had in place when they arrived. There were already 14 professors in place at SACS in 1914 when it merged with the Diocesan College higher education section. These 14 professors presided over a curriculum that was essentially modelled on what would have been found in the British universities: the major European languages, classics, Hebrew, mathematics, physics, chemistry, biology, law, and engineering. Fields such as medicine and education were established in 1904 and 1911. Architecture and commerce were to come later (see Phillips, 1993). At Rhodes University College, the four founding fathers between them taught chemistry, mathematics, English, history, Greek, Latin, philosophy, modern languages, and Afrikaans and Nederlands (Buckland & Neville, 2004). The subjects taught at the Natal University College included, interestingly, technical ones such as sanitary

engineering, telegraphy, plumbing, and business training (Brookes, 1966, p. 4). Seen thus, the curriculum was indubitably European in its essential foundations. Confirmation of this is evident in the examinations that the UCGH conducted. In its Council Report for the year ended 1909, on the eve of Union, the UCGH issued results for the Bachelor of Arts in Languages and Philosophy, the BA in Science, for qualifications in surveying, mining, law (both the LLB and various law certificates), and in music (Cape of Good Hope, 1910).

But how might one assess this curriculum in terms of openness? Did its European provenance automatically make it closed? The answer to this must be worked through the prism of the ambivalence, the racial anxiety of the political leaders who were sponsoring the universities, and the commitment to academic freedom espoused by some of the professors that marked the time. It is important to be clear that this curriculum and its knowledge points of departure in their fullness were not anti-African or even racist. In their content, the majority of the subjects were not conceptualised, invested with in their content and in their subsequent enunciation, projected as being against anybody. In this sense these bodies of knowledge, even in their most problematic form, an idea to which I will speak below, were not inscribed in hostile registers. But they were appropriated and presented problematically. This appropriation and presentation was problematic on two fronts. First, it came to be used as the creation and even the property of a pristine and virginal Europe. We can now emphatically show how the Europeanisation of this body of learning and wisdom was constructed around a falsehood (see, inter alia, Chinweizu, 1987; Davidson, 1974; Diop, 1991). The so-called Greek legacy, as Bernal (1987) would argue, depended on a complex multicultural, to deploy the term for another time, skein of influences. But what this appropriation as a European artefact made possible was a narrative for modern progress and civilisation that was ineluctably racial. The second way in which it was problematic was in the sense that it operated, and still does, on the presumption of the only defensible scientific base for the validation of knowledge. All other forms of knowledge were inferior precisely because of their unscientific foundations. African explanations of phenomena were incapable of being verified and, consequentially, imminently susceptible to falsification. Here was available to the less civilised people of the world, the European template for the making of modern progress. In it marched into the future the figure of the *universal man*—white, masculine, and able-bodied and, in the trope of the colonial ideal, dressed as a gentleman, in total self-control. It is in this sense that this knowledge could be held forth as the gift of Europe to the rest of the world and to which the “open-minded” and liberal Cape believed its darker-of-hue subjects were entitled as citizens.

In founding the essential curriculum with this repertoire, one comes to a sense of what the early institutions valued. This repertoire reveals what dominant thinking on what was important for young people to know was all about. But it does not go far enough in helping one understand what the sociological orientations around the society, in which these early academics found themselves, were all about. One sees this more clearly not in the classical curriculum but in the new fields of learning that were emerging in the social sciences. To be sure, older humanities or social sciences fields such as history came under some critical scrutiny in this time, with the UCGH, for example, requiring matriculation candidates to be “carefully prepared with a view to concentrating attention on South Africa and on those aspects of modern History bearing directly upon colonial development with special reference to South Africa” (Cape of Good Hope, 1910, p. 7). It was, however, in fields such as anthropology, sociology and psychology that the questions of race were to become the sites of intense contestation. Interesting interventions were being made in the new field of anthropology by administrators and academics. An administrative intervention was evident in the offering of one of the country’s very first research awards in 1909, the Chalmers Memorial Prize. The subject for the prize for 1909 was “Forms and Methods of Government among the Native Races in South Africa” (Cape of Good Hope, 1910, p. 6). Curiously, it decided that for 1909 it would not make an award because, and this is not explained, “neither of the essays sent in was deserving of the prize, and the

award was accordingly withheld" (1910, p. 6). Also interestingly, it decided that the next time the competition would be held, in 1912, it would have for its subject the question of "The Respective Spheres of White, Native and Other Labour Appropriate to the Development of South Africa" (1910, p. 6). There clearly was an interest in coming to terms with the sociology of the country.

These interventions were followed by a dispute between academics at the University of Cape Town that was more influential. The most significant aspect of the dispute related to the question of anthropology and ethnology and were to be seen playing themselves out in intense debates at the University of Cape Town between Reverend W. A. Norton, the founder of the Bantu Philology Department at UCT, and Alfred Radcliffe-Brown, chair holder of Social Anthropology in 1921, about whether indigenous languages should be taught. The former insisted that there was a need "for the scholarly study of the indigenous African population" (Phillips, 1993, p. 21). He would make the argument that it was "incumbent on a new South African university to take up the study of the indigenous all about it" to enable "a sound Union 'native policy' to be developed" (1993, p. 21). He would say to the South African Association for the Advancement of Science meeting in 1916 that "many a fatal mistake not only in dealing with individuals but also of general policy might have been avoided by a grounding in ethnology and comparative religion" (1993, p. 21). Radcliffe-Brown, on the other hand, was contemptuous of the poor fieldwork techniques of his colleagues and insisted that "a trained anthropologist with no knowledge of the language will do work of infinitely more scientific value than an untrained man with a perfect knowledge of the language" (1993, p. 23).

Critical about this dispute was the question of method. Method, Radcliffe-Brown would urge, could not depend on the fluff of Norton's collections of African folktales. It had to be rooted in science. He pioneered the methodology of structural functionalism, which was premised on the idea that social structures were reproduced through the obligations of kinship. He would, with this, write extensively on the specific "tribal" characteristics of the people he had studied. Much of this was "distributed to magistrates and missionaries" (Phillips, 1993, p. 24). The other universities would quickly follow UCT's example (see Brookes, 1966; Buckland & Neville, 2004) in developing their own versions of this kind of knowing. Important about these developments is that they came to produce the functional(ist) knowledge needed about the native. In this knowledge, was the scientific authority for the "correct" ways in which to manage the native.

At issue, of course, at one level was what this knowing was all about, what was in it, and what it presumed. At another level it was the very subjectification of the body of the other as a site of knowledge, a site, moreover, over which the native had no authority. In this process, what came to be instituted in clarifying the role of the university with respect to African people was the deployment of knowledge of Africa in terms of extreme commodification. The African body was available to be assembled, scrutinised, and pronounced upon. Here was the fledgling university system at work in resolving its position with respect to the people around it. This was, in the constitutive dynamic of the modern South African university, a deeply determinative moment. The university put itself at the service of the social order. Race was about knowing the other objectively.

Conclusion

Two points about this constitutive knowing are crucial for understanding the process of transforming the modern South African university. The first is that the Dale and Rhodes' project ultimately comes to prevail. It, moreover, not only prevails but sets in place the conditions for the management of racial discourse in the country. I will return to this. The second point to make is that to prevail as Dale and Rhodes' white supremacy does, it does not do so without quite extraordinary resistance. The important insight to take away here is that even as this white supremacy entrenches itself, there

remains inside the universities the persistent expression of an alternative sociocultural appreciation of the other.

The argument can be made that the rapidly growing higher education system that emerges in South Africa maps constitutively onto the social morphology of the country. There is no doubt that it furthers the project of white domination. The ways in which it does so, significantly, are not simply through the imposition of crude power. That crude power is evident in the admissions practices of the emerging universities. They exercise a kind of physical violence on young people of colour seeking admission. These young people are told, repeatedly, that it is not in the interests of the university to admit them. What these interests relate, as was reflected in Dale's crass racialised and gendered chauvinism, relate to an anxiety about bodies of colour and the fear of contamination they represented. That crudeness, however, required a much more sophisticated explanation. Fear itself was not a sufficient argument. It is here that the Radcliffe-Brown "knowing" intervention comes into its own. This intervention is premised on the objectivity of science and so one sees how, through this, the emerging university in the choices of what it seeks to include in its curriculum, and, powerfully, what it comes to understand as "good research," comes to be lined up behind the project of white supremacy.

Crucially, however, there were always individuals who resisted these developments. At all of the new universities there were individuals who, from a range of disciplines and in very different ways sought to argue for other approaches than that of white supremacy. To this resistance they brought their disciplines, their moral convictions, and their political affiliations. As Hendricks and Vale (2005) make clear, lodged deep inside of these emerging universities existed, and sometimes thrived, alternative ways of seeing the world. Evidence of the presence of these alternatives made themselves felt throughout the first few decades of the growth of the universities when individuals and groups regularly contested and won challenges to the admission of students of colour, and, critically, in the ways in which they argued for curricula that were much more open-minded, and to be able to research in areas that they deemed to be important (Hendricks & Vale, 2005). Their approach to knowledge, to resist its racialisation, was evident, even as they lost the battle, over the course of the landmark New Education Fellowship conference convened by Ernest Malherbe in 1934. At this conference, progressives, buoyed by the presence of the American philosopher John Dewey, argued powerfully for anthropologies, psychologies, and educational theories and programmes for research that did not stigmatise people (see Dubow, 2006, p. 229).

With this, I argue that the emergent South African university is constituted in a particular kind of Manichaean duality. It is unquestionably an important constituent member of the global knowledge production movement. But, as is also the case for its sister institutions in most parts of the world, and notably the United States and those other colonial outposts where the questions of race, culture, and class come together, it presents itself as a profoundly distinct version of the movement. Not unlike the situation in Australia, a particular dynamic that was to manifest itself in higher education was the question of race. It generally, and in some cases rabidly, defended its whiteness. It did not allow admission to people of colour. In response to this, one sees individuals and institutions themselves strategising to hold on to a commitment to openness and fairness. This involved manoeuvring on occasion to bring in students of colour. Individuals in the institutions would place themselves at great risk on occasion (Hendricks & Vale, 2005). John Tengu Jabavu himself would organise to establish the South African Native College at Fort Hare in 1915 (Buckland & Neville, 2004). Slight and tokenistic as these initiatives sometimes were, they revealed the ambivalence lodged inside of the system. It is this ambivalence that one needs to acknowledge and work with in seeking to restructure the university as it operates in the current period.

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Public Scholarship, Democracy and Scholarly Engagement

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Abstract

This article will examine the issue of scholarship resulting from engagements between academics and the communities of the university, and especially such scholarship that is derivable through the possibilities for the co-construction of knowledge between them. Towards this end, it will examine the limitations of conventional approaches to the production and evaluation of scholarship and advance an argument about the impact of such limitations on the broader social purposes and role of science. It will suggest how scholarship that is socially more encompassing might be advanced as intrinsic to the role of universities in their communities, and examines how the concept of community might be conceived for that purpose. It relates such public scholarship to the broader purposes of science as an intellectual and social activity that has affinity with the idea of public reasoning.

Keywords: co-construction of knowledge, intellectuals, public reasoning, scholarship, socially engaged scholarship, university community

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Introduction

The main purpose of this writing is to engage with ideas about, and interpretations of, socially engaged or public scholarship, namely, scholarship that is derived from the co-construction of knowledge out of meaningful engagements between academics and the communities and publics of the university—especially such communities that are outside the university but reliant on the useful roles that can be played by academics engaged in critical thinking in institutions of higher learning. My approach privileges an engagement with those communities of the university that are most socially marginalised and whose access to social, economic, and political power is limited by the social relations in which such communities are implicated because they continue to remain, even in social democratic capitalist states, the most economically exploited and poorly represented politically, and are culturally and sociohistorically marginalised in both urban and rural society all over the globe.

Towards this, I will explore the following issues:

- Conventional academic interpretations of scholarship and their limits.
- Wider dimensions of scholarship—as socially engaged knowledge
- Who is the community for engaged scholarship?
- The wider purposes of science and public reasoning.

Conventional Academic Interpretations of Scholarship and Their Limits

Ideas about socially engaged and public scholarship might appear self-evident to some academics but it is hardly so amongst academics and intellectuals in general, and interpretations of scholarship, while not wholly conflictual and contradictory, are nonetheless riven by competing emphases and interpretations about its central tenets and characteristics. For our purposes, exclusionary academic approaches to scholarship are not only dominant relative to nonacademic conceptions, but also favour constructions that stress particular attributes of the concept less emphasised by those outside academia—to the extent that those “outsiders” engage in this issue at all.¹

Conceptions of scholarship have a history. The concept of scholar, as Bitzer (2006) advised us, originates in the 11th century and was interpreted as having a social rather than an individualistic meaning. By the 16th century, it came to attach to “a learned and erudite person; especially one who is learned in the classical (i.e., Greek and Latin) languages and their literature” (p. 374). Bitzer referred (à la Talcott Parsons) to the “competence in mastering knowledge and the techniques of its advancement” and the “obligation of integrity, a commitment to the values of the academic profession” (p. 374), which are qualities that Booth (1988, cited in Bitzer, 2006) called “habits of rationality,” and include “courage, persistence, consideration, humility and honesty, virtues of great consequence in shaping the intellectual work of the scholar” (p. 374).

Indeed, what is meant by *intellectual* in this instance is itself a matter for discussion because the term has had many meanings attached to it, historically. In contemporary Western society, it is used ad hoc (see Eyerman, Svensson, & Söderqvist, 1987)—referring to people with university degrees or in specified professions (writers, journalists, and teachers), or by concentrating on their alleged social roles or function, or through their psychological and behavioural traits. Structural, referring to “an

¹ It is worth noting that while in academia the discourse about scholarship happens in the context of university life and its forms, the great body of human knowledge (even in the restricted domain of the Western intellectual tradition) does not coincide with the existence and forms of the production of academic knowledge. See also Walden Bello (2008).

observable position in the social structure,” and phenomenological approaches, referring to “the self-understanding and perceptions of the individual as shown by his or her particular ways of thinking and acting,” have also been used to define intellectuals (Michels, 1966, p. 3). But I do not here delve into this important issue which has significance in its own right, and which has also been written about widely (see Said, 1996).

It remains true that in most approaches,² the idea that scholarship through research is the key to how we understand higher learning (Motala, 2011). Such scholarship is critical to the life and work of academics. The production of scholarly writing that is peer reviewed and published in accredited journals has value for reasons that are obvious. Such scholarly activity attracts students into faculties that have renown; it encourages leading scholars in the field to seek employment at the university, improves its standing internationally, inviting greater collaborations with it, and improves its long-term prospects. It brings prestige to the university and, most importantly, attracts increased funding to achieve the planned goals of the institution.

Yet, even a brief excursion into some of the views expressed on how it is understood will show that there are criticisms of conventional ideas about scholarship, even in academic circles (Motala, 2014). Although it may be agreed that the idea of scholarship refers conventionally to the activities of teaching, research, and service functions, in practice it is largely about research and publication. Atkinson (2001) took issue with the dominance of this interpretation of scholarship arguing for the important role for the scholarship of teaching.

The scholarship of teaching is a concept with multiple ramifications. It is at the core of the current transformation of higher education. The scholarship of teaching challenges the existing stratification system within the academy. The scholarship of teaching and learning is a much larger enterprise, a movement that can transform the nature of academia. (Atkinson, 2001, p. 1)

Paulsen and Feldman (1995) argued even more fundamentally:

Everyone agrees with the contention that creation of new knowledge through research and publication is an essential dimension of scholarship. But this conventional conception of scholarship has been criticized as too narrow and restrictive. . . . Today an increasing number of faculty and administrators support an enlarged view of scholarship that encompasses and encourages the full range of diverse, creative talents of faculty, allows for different disciplinary perspectives and provides a framework for the development of mission statements expressing more distinctive and differential priorities. (p. 615)

They relied on Boyer’s approach for widening the responsibility of scholarship. For Boyer (1990, cited in Bitzer, 2006, p. 374) scholarship has several attributes. The *scholarship of teaching* was about the creation of knowledge through the process of debate and “discourse” and was a “continuous process” of re-examining knowledge associated with the idea of “discovery.” The *scholarship of discovery* was the “process of intellectual excitement” and not about the “outcomes of knowledge,” while the *scholarship of application* was about “professional activity and service”—subject to the

² Part of the following text adapted from a Nelson Mandela Metropolitan University (NMMU) research report (Motala, 2011).

same rigorous criteria as teaching and research. The *scholarship of integration* was about connecting various disciplinary knowledges. All scholarly work, though, “could be appraised by qualitative standards that needed to be explicitly articulated.” Even these broader characteristics, defined by Boyer (1990, cited in Bitzer, 2006, p. 374) were viewed critically because, we are told, they lacked any orientation to the “socio-economic contexts and historical purposes of universities.”

A wider conceptualisation of scholarship will result, for Paulsen and Feldman (1995) in a clearer understanding of a range of activities germane to universities and avoid them being “lumped together conceptually” and will support a differential approach to the priorities of “various scholarly activities in the university as well as concomitant tensions that arise both within the university and between it and wider society” (p. 637).

Expanding the Dimensions of Scholarship—As Socially Engaged Knowledge

While these expanding definitions of the concept of scholarship are instructive and reassuring, they continue to be excessively academic and inward looking and contained within the conventions of academic life and activity. Very little is said or understood about how these critically constitutive elements of the life of universities can be fostered together with activities directed at the stimulation of a democratic culture through socially engaged or public scholarship. A wider approach is required for that, and an imagination that conceptualises such scholarship as associated with public reasoning and engagement to generate wider knowledge. Boyer's view that scholarship should encompass not only the scholarship of research (discovery) but also the pursuit of scholarship of integration, application, and teaching should be amplified to include the scholarship of public and democratic engagement in the co-construction of knowledge beyond academic knowledge. This latter approach requires critical reflection on how knowledge is constituted and developed, to what purposes, based on what assumptions and choices and, most pertinently, about whose knowledge is privileged and whose excluded—so that the epistemic exclusion of the perspectives, knowledges, and experiences of outsiders is examined.

This latter issue is of course the subject of a much wider and more fundamental discussion that is not developed here. It concerns the question of what knowledge is validated, and in whose interests in the context of history. Several important and justifiable criticisms can be made about the sources of knowledge that are privileged in the academic enterprise throughout the world. In the main, this refers to the criticism that too much of academic knowledge is based almost exclusively on the foundations of Western thought. African academics have been rightly accused of being unashamedly European (and American) in their intellectual orientations and their sources for theorisation and knowledge construction. Indeed, even the forms of theorisation itself have been brought into contention because it is often regarded as reductive and essentialising. It has been cogently argued that the nature of many social scientific approaches rely on generalised explanations that are transmitted uncritically across contexts. These exclude other, and particularly local or indigenous, ways of knowing. Ignoring the knowledges of local communities (and whole nations and continents) has been the experience of many peoples, globally. The act of deliberate exclusion and denigration of the forms of knowledge developed by local communities is a direct consequence of colonial violence and conquest, subjugation, and sociocultural oppression. This violence has mostly been written and talked about in relation to its political, economic, and social effects. These have been experienced through economic exploitation and poverty, the denial of political and social rights, and so forth. But what is not often referred to, is the enormity of the impact of Western colonialism in particular, on the knowledge systems, ideas, languages, and traditions of communities and civilisations throughout the world and particularly in Latin America, Asia, and Africa. The effect of this epistemic violence, that is, on the systems of knowledge of local communities, has been written about (now) quite

extensively by writers such as Nabudere (2006), Odora-Hoppers (2002), Shiv Visvanath (2014), Howard Richards (2004), V. Y. Mudimbe (1988), and many others.

This epistemic violence is compounded by the continued marginalisation by many post-colonial/apartheid academics of some critically important communities in which the university is situated—defined broadly, that is beyond the confines of the ivory tower and its particularistic or academic interests—to the exclusion of other claims. Such communities (especially of the poor and working classes) are treated largely as the subjects of research without serious consideration being given to how such communities are engaged about the substantive issues, methods, and strategies employed in scholarly research. As McClellan and Powers (2012) have argued:

Simply put, we do not generally write for an audience beyond our academic associations and academic peers. We, and rightfully so, pursue what will help us keep our jobs. . . . [However] scholars among us as well as our professional academic associations have repeatedly called for making our research more accessible to the field. Yet, critics within our ranks have argued that doing so lessens the quality of our scholarship. Believing that our legitimacy is predicated on a new knowledge advancement platform akin to that of the natural sciences, we simply have not been able to break from Newtonian stasis. (n. p.)

Writing in a similarly critical vein Jean Dreze (2002), a regular collaborator with Amartya Sen on works dealing with public action by community groups in India, had this to say (p. 817):

Social scientists are chiefly engaged in arguing with each other about issues and theories that often bear little relation to the world. . . . The proliferation of fanciful theories and artificial controversies in academia arises partly from the fact that social scientists thrive on this confusion (nothing like an esoteric thesis to keep them busy and set them apart from lesser mortals). . . . To illustrate, an article in defence of rationality (vis-à-vis, say, postmodern critiques) would fit well in a distinguished academic journal, but it is of little use to people for whom rational thinking is a self-evident necessity—indeed a matter of survival. . . . It is no wonder that ‘academic’ has become a bit of a synonym for ‘irrelevant’ (as in ‘this point is purely academic’).

In effect, the measure of academic outputs (such as by a fixed annual number of accredited journal publications) is inadequate to evaluate or understand the work of academics who are often engaged in a wider array of scholarly activities beyond the publication of accredited research (Academy of Science South Africa, [ASSAf], 2006³), post graduate supervision, and university teaching. Some of these other activities can be viewed on a continuum between research to dialogue and public engagement activities, intellectual debate, and social critique—together with teaching and the publication of a wide variety of writings associated with this work.

Dreze (2002) was not at all dismissive of the value of academically rigorous study but insisted that scientific pursuits can be enhanced even further if grounded in “real-world involvement and action” (p. 818). This implies the need for wider conceptions of scholarship in social settings and the use of scientific knowledge to address the seemingly intractable issues facing democratic societies. It

³ The issue of journal accreditation is itself contentious. It has importance because the selection of journals has effects on the formula for research funding and, indeed, according to the ASSAf report, “on the development of local journals, the behaviour of individuals, the financial sustainability of learned societies that produced the journals and the institutions that received the ‘output’ subsidy” (ASSAf, 2006).

requires academics to reach beyond the responsibilities of conventional scholarship associated with the production of peer-reviewed articles, teaching, and postgraduate supervision. Academics can amplify their roles by making their intellectual outputs more widely available to the university's publics, engaging with its many challenges, building the relationship between the university and its community, relating academic knowledge to its application, and producing new conceptualisations and theories by engaging with the critical issues that face society. They can support the production of scientific knowledge that is anchored in a deep and enduring approach to the public good while it simultaneously interrogates commonly held ways of knowing by engaging with the wider range of the sources of knowledge and its epistemologies. This approach would enrich the university's capacity to engage with the direct experiences of society because in these experiences too, lie deep reservoirs of understanding—local ways of knowing and acting that can often be relied upon to solve some of the difficult dilemmas facing society and the quest for understanding social and other phenomena better. By doing this the university can avoid the pitfalls of knowledge that ignores the possibilities of learning from social experience, relying on academic knowledge as the “only” and “objective” basis of scientific understanding. As Susan Haack (2007) said in her book, *Defending Science: Within Reason*, the idea that there is a universal and singular approach to science is not tenable because:

science . . . is a thoroughly human enterprise, messy, fallible, and fumbling: and rather than using a uniquely rational method unavailable to other inquirers, it is continuous with the most ordinary of empirical enquiry, 'nothing more than a refinement of our everyday thinking,' as Einstein once put it. (p. 7)

Who Is the Community for Engaged Scholarship?⁴

Given its conflictual history there is a much wider range of bodies, institutions, organisations, and individuals that constitute the community of interests relevant to the work of academics in South Africa. These represent a range of bodies such as rights-based interests groups, civic bodies, student organisations, social movements, worker's unions, local community groups, and even individuals interested in engaged scholarship for a variety of reasons, academic, political, or organisational. The question about who its community is, raises a more fundamental issue relating to the intellectual and practical choices made by academic institutions in engaging with particular communities more than with others. The proclivities assumed in particular choices are not neutral and, although they may be justified on the grounds especially of third-stream income or pragmatism, they nevertheless speak to the deliberate or coincidental exclusion of some communities relative to others. In reality, these excluded communities are likely to be the very communities that suffer social and economic marginalisation, political indifference, and cultural deprivation for as long as academics and the institutions they habit remain indifferent about the choices they make.

The manner of engagement with such communities can differ quite considerably one from the other. For instance, engaging with a community of academic peers is very different from the practices of social analysts working in or outside the legislative bodies of the country. And of course both these are quite different from the mode, purposes, and forms of engagement with local communities—themselves having differences based on geographic location, levels of organisation, languages of communication, levels of literacy, local histories, traditions and practices, issues of particular relevance to social science research—largely avoided in conventional academic research.

⁴ I do not deal here with the debates about the concept of community that has been dealt with elsewhere. Here, it is limited to those communities traditionally excluded from the discourses of academia and, more particularly, to those members of society who are most socially marginalised in every way.

A discussion about scholarship and community also raises important questions about the relationship between research and its methodologies because of the dangers of objectifying communities in research, an issue dealt with by other scholars too (Vally, Motala, & Ramadiro, 2009). Increasingly, scholarship must engage with the possibilities and value of ethnographic approaches to research to satisfy the criteria of non-objectification, to understand subjectivities, and to integrate the methodologies of enquiry in mutually enriching ways.

Such an approach recognises the conflicting research traditions in the sciences in general and in the social sciences in particular. Popkewitz (1985) referred to this conflict of traditions requiring:

an inquiry into the social, political and epistemological assumptions that shape and fashion the activities and outcomes of research. One of the ironies of contemporary social science is that a particular and narrow conception of science has come to dominate social research. That conception gives emphasis to the procedural logic of research by making statistical and procedural problems paramount to the conduct of research. This view eliminates from scrutiny the social movements and values that underlie research methods and which give definition to the researcher as a particular social type. As a result, the possibilities of social sciences are at best limited, and at worst mystifying of the very human conditions that the methods of science were invented to illuminate. (p. 2)

The necessity to engage and to construct methodologies for such engagement also leads to many questions about the dissemination of scholarly knowledge compounded by the overt and other relations of power that pervade the publication of research more generally. Academics need to engage more fully with the forms of publication and writing that could result from such research. These modes are demanded by the very process of engagement. In addition to the production of written work for the research process itself, there can be a diverse array of writings emanating directly from research. These could include reports and policy briefings for decision makers, media, and popular writings, monographs and advocacy materials, discussion documents, conference presentations and the like, augmented by the many ways of disseminating writing through the social media and Internet.⁵ The failure to recognise the intellectual commitments of academics whose work transcends the boundaries of conventional research and who seek to bring into reckoning intellectual work of theoretical *and* applicative value, together with social critique, lends credence to the idea that such scholarship has no value. Consequently, academics and others who seek to open spaces for nonacademics to make claims about contributing to the body of scholarly knowledge—by implication seeking also to widen the definition of scholarship in relation to intellectual work—are marginalised.

Conventional approaches reliant on peer-reviewed publications are simply inadequate for making scholarship more widely accessible, especially because of the compelling grip on peer review on the determination of what succeeds or fails in the scholarly enterprise outside the realm of master's and doctoral studies, and now, increasingly even in that regard.⁶

It may be that academics have largely resolved the intellectual roles and the demands on it through the requirement of the peer review system, the “publish or perish” imperative, and through the expert supervision of academic dissertations. There is, for instance, no requirement that the work be

⁵ For an example of popular writings, see booklets produced by the Education Rights Project of the Centre for Education Rights and Transformation [CERT] at the University of Johannesburg.

⁶ The University of Pretoria, for instance, requires some categories of doctoral candidates to publish their work as it progresses.

widely read and disseminated or be accessible to those not in the academic community. The constant refrain against such research that it “lies on the shelf to gather dust” is to that extent, naïve and seemingly unreasonable because widespread dissemination is never a criterion for such research. The rationale for a selective and privileging disposition about the availability of academic research lies in the view that the demands of scholarly rigour preclude such inclusivity. But such a view is disingenuous from the perspective of the public purposes of knowledge and the responsibility of universities to engage with its communities.

Wider Purposes of Science and Public Reasoning

It can also be argued that scientific knowledge (Dunbar, 1995) without a wider social purpose—as is sometimes implied in the reductive way that the idea of the third mission of universities is conceived—does not orient itself sufficiently to the broader aims of enquiry and the production of knowledge as envisaged by many of the greatest thinkers through the ages. They have pronounced unequivocally on the social moral, spiritual, cultural, and other purposes of knowledge essential for the resolution of social and human issues (even if these relate to the physical and cosmological environmental inhabited by humans) and as inextricable from the purpose of addressing the lives of humans as conscious beings.

One of the purposes of civic science is to address the distance between science and society, to find ways of relating to the questions of science in more socially engaging ways so as to enhance democratic social processes for resolving the complex problems faced by societies globally. This can be done by respectful engagements between scientists who are conscious of their social location and roles as a part of the democratic citizenry. It requires interconnected ways of producing scientific understanding between the laboratory and citizen-initiated scientific endeavour, for instance, research related to clean water sources, food security, sanitation, power supply, and the environment. It implies a commitment by academics to engage with scientific issues in ways that engage with the framing conditions for much of science—as it arises in the context of the lived realities of the citizenry—especially those who have least access to the modes of academic enquiry and have little impact on both the choices implied in the process of enquiry or its outcomes. It seeks collaborations between “experts” and the socially useful knowledge and the understanding inherent in community experience and implies a collective approach based on a willingness to recognise differing—and sometimes contradictory—emphases about the uses of science as a social activity. It requires scientists and the citizenry to engage with each other about the underlying assumptions and choices that inform scientific practice, the use of public resources together with the requirements of rigorous science and its ethical boundaries, limits, and possibilities.

It is not concerned to “interfere” with scientific endeavour but to engage with and understand its methodological premises from the perspective of its civic value. It implies an openness to accept that systematic enquiry can be enhanced by employing a wider variety of sources of data and enjoins us to think about the aphorism attributed to Einstein that information alone is inadequate as knowledge, since experience is the real source of knowledge (Seelig, 1995). Such experience lies not only in the experience of scientists but in the wider array of social experiences impacted on by scientific endeavour and the processes informing scientific choices. For instance, in regard to the research about hydrofracking in the Karoo there can be no simple answers provided by experts alone because a variety of social and ecological systems—reinforcing one another—are brought into contention by purposeful research into hydrofracking, raising fundamental questions about the methodological and social assumptions about such research. Developing diverse ways of understanding reality requires us to rethink the assumption that only those who have the benefit of academic credentials can make valuable scientific judgements even when these judgements have pervasive social and ecological effects. It calls for a deliberative commitment to collaboration

between scientists and the citizenry to legitimise scientific endeavour beyond the academy by accepting the ability of all human beings to engage with each other in the development of shared ways of knowing and for democratic practice. This is best illustrated and embodied in the work of environmental scientist Jane Lubchenco's (1998) view that:

As the magnitude of human impacts on the ecological systems of the planet becomes apparent, there is increased realisation of the intimate connections between these systems and human health, the economy, social justice, and national security. The concept of what constitutes "the environment" is changing rapidly. Urgent and unprecedented environmental and social changes challenge scientists to define a new social contract. This contract represents a commitment on the part of all scientists to devote their energies and talents to the most pressing problems of the day, in proportion to their importance, in exchange for public funding. The new and unmet needs of society include more comprehensive information, understanding, and technologies for society to move toward a more sustainable biosphere—one which is ecologically sound, economically feasible, and socially just. New fundamental research, faster and more effective transmission of new and existing knowledge to policy- and decision makers, and better communication of this knowledge to the public will all be required to meet this challenge. (p. 491)

Indeed as the Wikipedia insert on her work states:

Throughout her career, Lubchenco has emphasized the responsibilities scientists have to society and the importance of effective communication between scientists and society. In her 1997 address as President of the American Association for the Advancement of Science, she focused on scientists' "social contract" with society, i.e. their obligation to not only create new knowledge that is helpful to society but also to share that knowledge widely, not just with other scientists. (n. p.)

Such approaches to science imply recognition of the potential ways of knowing that lie with nonscientists, especially in regard to phenomena impacting directly on their lives. It affirms the value of civic agency in the development of scientific knowledge for democratic societies through the cocreation of their ecological and social environment and enhances the possibilities for the democratising knowledge—including scientific knowledge, its practices, and culture.

This means that wider conceptions of scholarship are necessary in social settings where scientific knowledge is used to address the issues facing democratic societies and requires public reasoning and other mechanisms to advance social awareness together with a wider intellectual and social orientation reaching beyond the responsibilities of conventional academic work, teaching, and postgraduate supervision. In fact, this conception of scholarship raises important definitional and practical issues⁷ which speak to the conditions for scholarship and raise more than a few important—some might say fundamental—questions about the intellectual demands of such scholarship.

⁷ The Concise Oxford Dictionary's definition of *scholarship* (2005) refers to "the quality of having attained learning" and somewhat tautologically it refers to "methods and achievements characteristic of scholars." We view it more as denoting the activity of producing new ideas, new interpretations of old ideas, adding to the body of human understanding, expanding the horizons of such understanding and taking understanding to a higher level of clarity *and* the modes and methods of doing so through the process of engagement in the production and dissemination of knowledge.

Associated with such a wider conception of scholarship is the idea of public reasoning. Amartya Sen (2005), Nobel Laureate, has written widely about the importance of reasoning and public reasoning in particular. Public reasoning is intrinsic, in his view, to any conception of democracy. As he has argued, “democracy is intimately connected with public discussion and interactive reasoning” (p. 14) and, as he has said, it is “government by discussion.” For him public reasoning has three attributes: it involves “respect for pluralism and an attitude of tolerance for different points of view and lifestyles”; “an open discussion of issues of common concern”; and “*political commitment and participation of people in public action for the transformation of society* [emphasis added]” (pp. 2–3).

Academics can amplify their roles by participating in scholarship through such public reasoning, making their intellectual outputs more widely available to the university's publics—engaging with its many challenges intellectually and practically to build on the relationship between the university and its community. In this way, academic knowledge is also related to its application, producing new conceptualisations and theorisation. It can support the production of scientific knowledge that is anchored in a deep and enduring approach to the public good.

In effect, discussions about scholarship need to be extended beyond the limits of the conventions of academic accreditation and the criteria presently in use for the validation of academic knowledge. It needs to examine the intellectual commitments of academics whose work transcends the boundaries of conventional accreditation and who seek to bring into reckoning intellectual work of civic and public science, policy-related and applicative research, social critique and community orientation, and the methods that inform such work. These commitments seek to validate intellectual effort beyond the prohibitive conventions that are prevalent. They seek also to open spaces for nonacademics who have a role in contributing to the body of scholarly knowledge—by implication seeking also to widen the definition of scholarship in relation to intellectual work and advancing the idea of the inseparability of intellectual work from thoughtful, critically oriented, and dialogically committed social activism and citizenship.

The role of academics needs to be problematised to deal with the ostensible separation between the scholarly attributes of intellectual and academic, activist and advocate, analyst and critic. A wider and socially relevant interpretation of scholarship should emphasise the importance of the space for thoughtful disputation, enquiry, and dialogue in ways that go beyond rhetoric, provides content and support to such a role, and recognises its contribution to democratic citizenship and social change. Its quest, to reiterate it, is to contribute responsibly to the social goal of a democratic, informed, and thinking citizenry. This means that for such scholarship, engaging through public reasoning on a range of matters affecting development (however that is conceptualised) is important. Such engagements open up the dialogic possibilities for the university and its communities—urban and rural communities, the powerful and the powerless—with social movements, trade unions, student bodies, rights lobbies, decision makers, and a range of other groups and interests. It assumes the stimulation of public dialogue and enquiry, public accountability and knowledge, disputation and debate.⁸ Socially engaged research raises a different set of questions beyond the confining boundaries of academic communities. Indeed, it raises questions about who exactly is its community besides its academic peers, postgraduate students, and the recipients of its “knowledge products.”

The processes of public and democratic reasoning are an essential instrument for the stimulation of open engagement and rational decision making about important national issues and the potential for mediating conflicting interests—especially where these are not easily reconcilable.

⁸ I do not engage with the critique about the possibilities and restrictions endured by scholarship within neoliberal regimes although we recognise the force of that view today. See Bronwyn Davies (2005).

Conclusion

The time for a rethink of the prevailing conventions of scholarship, and the asphyxiating grip on it of peer review, has arrived. Approaches to scholarship that disregard its relation to public good and social purpose—confusing these with dirigisme—should be the subject of critical scrutiny and attentive debate amongst all those who are affected by the scientific undertaking. Such debate could, moreover, have practical value in defining the criteria for the allocation and use of public resources in the development of scholarship.

A broader definition of scholarship can be posited relating to its value in symbolising the activity of conceiving important ideas for creative thought, research, the production of new ways of thinking and explanations: new interpretations of old ideas, adding to the body of human understanding, expanding the horizons of such understanding and explaining phenomena more clearly. It includes the modes and methods of doing so through the process of conscientious and careful study, not unrelated to practice and experiment depending on the issue at hand (Capra, 1983⁹). It refers more broadly to the activities of intellectuals both in and outside research institutions and should speak to the value, purposes, and modes of scientific enquiry as these relate to social choice—whether they arise from enquiries about natural phenomena or social questions.

We are enjoined by the very nature of our roles in academia to reflect on the social value and uses of knowledge, on the responsibility of public bodies and its academic faculty, about the relationship between knowledge and the power of the unexamined dominant ideas that hold sway in society. As scientists (social or otherwise), we are obliged to engage self-critically with questions about the nature of our undertaking, its definitions, axioms, and assumptions, and with its underlying values. For example, it would be difficult for social scientists to avoid questions about the effects of global corporate capitalism on developing societies and the range of factors that present many intersecting challenges as the background to social analysis. For such analysis it would be necessary, for example, to recognise how the emerging democratic state is reconfigured at this time, whose interests are served by it, the orientation of the state to issues of race, class, and gender, urban-ness and rurality, to social rights and individual choice, questions of social, economic, and cultural power and the social relations engendered by these as intrinsic to useful scholarship.

We need to think of how the university might properly support such socially responsive scholarship, augmenting the value of academic and publishable work. More discussion and complex and nuanced criteria are required to include the various forms of scholarly engagement. If all research was judged only by its academic merit then we would be deprived of the great body of human knowledge acquired over many millennia in the great exchange of ideas throughout human history because very little of it was produced within the conventions of academia.¹⁰

We should strive to search collectively for a more encompassing approach to scholarship untrammelled by the heavy hand of academic peer review and the idea that scientific endeavour is best expressed solely through the processes that privilege an academic caste alone—engrossed in its

9 Newton, for instance, attempted to reconcile the demands of two opposing trends in the 17th century: the empirical, inductive method of Bacon and the rational, deductive method of Descartes. Newton emphasised that “neither experiments without systematic interpretation nor deduction from first principles without experimental evidence will lead to a reliable theory.” This went beyond both Bacon’s and Descartes’ systematic experimentation and mathematical analysis, respectively, and advanced the methodology on which the natural sciences have been based since then (see Capra, 1983, p. 64).

10 Of the great natural philosophers and scientists of the past, it would be surprising to find any who produced scholarship by the conventions of academic research. See also Conner’s (2005) *A People’s History of Science* in which it was argued that nearly every significant advance in science was attributable to the prior experience gained from artisanal, seafaring, navigational, midwifery, mechanical, blacksmithing, craft-related, and other “ordinary” endeavour.

private ruminations. We are called upon to transcend the limits of the internally self-referential approaches for validating scientific knowledge and to problematise the present systems of its authority. This requires an intellectual activism that includes critical scholarship beyond the limits of academic writing and teaching, knowledge, discovery, and integration. Ultimately, a wider than academic interpretation of scholarship attesting to the importance of the public spaces for thoughtful disputation, critical enquiry, and dialogue—engagements important to the goal of a democratic, informed, and thinking citizenry, seem obligatory and unavoidable.

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Whose Knowledge is It? Towards Reordering Knowledge Production and Dissemination in the Global South

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Abstract

This article aims to refocus attention on the long-debated issue of the politics of knowledge production and dissemination, and the power dynamics inherent in what counts as legitimate knowledge, who authors and what resources are available to them, and who decides. With increased resources and spending on research and development efforts on one hand, and seemingly increasing sociopolitical challenges on the other, it is worth asking: What is it about research and publication endeavour that makes it largely unequal and ineffective in addressing the issues it is developed and published to address? What would happen if we interrogated, challenged, and transformed the unequal power dynamics inherent in academic publishing? What strategies might we as social science scholars in the Global South use to perform such an exercise? More importantly, how do we ensure that the voices of the people we research, who are often poor and reside outside the academy and are, therefore, less academically powerful, are taken seriously in our research efforts? The article argues that it is only when knowledge is co-created, co-analysed, and co-communicated with research participants that we can hope to transform the unequal power relations that exist when we approach research contexts as outside experts and the knowers. The article explores paradigmatic approaches and epistemological tools that can enable us to transform and open our research spaces and enable participants to debate, challenge, and ultimately transform social relations in communities.

Keywords: community, knowledge development, power, participatory research, social change

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Introduction

An evolution is necessary, one that dismantles our legacy of knowledge and brings our society into alignment with the values of our Constitution. This reordering in the domains of knowledge development would reconnect South Africa with changes afoot in other post-colonial societies. (Leonard Martin, 2012, para. 2)

International scholarship on the politics of knowledge, its production, and dissemination is abundant (see for example, Apple, 2000; Brown, 2011; Fiske, 1989; Muller, 2000; Weiler, 2011; and others). Similarly, informed largely by the research we produce, a plethora of interventions have been developed and implemented in communities and institutions identified as needing development. With these initiatives, both local and international donors and governments have spent huge amounts of financial and other resources. In spite of this, the development challenges South Africa faces seem to be continuing, with little sign of improvement.

As Weiler (2009) pointed out, explanations for this may lie largely in the fact that available research, which informs such interventions, tends to pay scant attention to the political conditions under which knowledge is often produced and used—and the consequences thereof. According to him, our scholarship continues to pay lip service to the ways in which knowledge is produced (and who produces it), how it is disseminated and used, and its links to the power dynamics in institutions, communities, and society. Thus, as Martin (2012) argued:

Almost 20 years after the demise of apartheid, South Africa has failed to undertake and complete its own knowledge transition consistent with the constitutional ambition of a democratic, just and peaceful society. The legacy of knowledge that constitutes and shapes our learning institutions is in fundamental need of change. (para. 1)

While there is no shortage of research addressing the various social issues plaguing our communities and institutions, such research seems to be having very little impact on social change. As this article asks, could the reasons lie in the fact that available research and the knowledge it produces about social issues tends to be created without any substantial participation and contribution from those most affected?

To illustrate, science, as opposed to other forms of knowledge, continues to sit at the top of the pyramid in the hierarchy of knowledge, globally. South Africa is no exception. From our quest to address our societal challenges, including poverty, HIV infections, and others, to our desire to compete equally with other countries (for example, in education, innovation, and the economy), it is to science that we often look for answers. This status of science can be traced back to, among others, Herbert Spencer's 1860 essay, which, in relation to what children should learn or be taught in schools, concluded that "learning the meanings of things, [was] better than learning the meanings of words" (pp. 93–94).

But what is it about science that has propelled it to this status, and why does this view of the hierarchy of knowledge persist? What have been the consequences of this view of knowledge on social change in contemporary societies, including South Africa? In an academic context that privileges science as a form of knowledge, what, if anything, can social science and humanities scholars contribute to knowledge for social change? For Hans Weiler (2009; 2011) the answers lay in an exploration of the nature of contemporary discourses on knowledge. Writing on the nature of scholarship on knowledge in North America and Europe, Weiler's thesis was that to this day,

contemporary discourses include no critical view of what knowledge means and how this has changed over time. Furthermore, such discourses have paid little attention to “the political conditions and consequences of the production and use of knowledge . . . i.e., the politics of knowledge” (Weiler, 2009, p. 485). In particular, the discourses have paid scant attention to potential structural changes in higher education that would emerge from scholarship that acknowledges the “epistemological and political transformation of contemporary knowledge culture” (2009, p. 485).

Addressing the question, what knowledge is of most worth for the millennial citizen in the South African context, more than a decade ago Muller (2000) noted that there were essentially two responses to the question. For him, the first response focused on cultural and political participation (including cultural knowledge and skills, political knowledge, and moral education), while the second addressed economic participation. To this day, in South Africa the dominance of the second category in response to what knowledge is of most worth, is captured in the various national education policies and interventions, particularly in education—see for example, the *White Paper for Post-School Education and Training* (Department of Higher Education and Training, 2013)—as well as in public discourse about the state of education in the country. These focus mainly on what knowledge would be most useful for passing exit examinations (for example, the Grade 12 or matric examination) and subsequently, in employment and the economy. Muller (2000) noted that this education for economic participation “growing increasingly vociferous, provides an answer in terms of skills and knowledge for economic productivity” (p. 54).

This article argues that, concerned with what knowledge would be most useful for employment and the economy, such an “instrumental” approach to knowledge production and dissemination might produce learners and graduates who lack the necessary tools for critical thought. In a context characterised by a variety of complex social, political, and economic issues, what is needed goes beyond just skills and knowledge useful for employment. Rather, what young people and adult learners need are skills, understandings, and values that foster critical thought and action (see also, Moletsane, 2014).

Furthermore, the need to address the pressing challenges in our society such as unemployment and poverty, HIV and AIDS, poor educational attainment, and others, has propelled academic research to focus on similar notions of what knowledge is needed as response. Knowledge that seeks to effect deep social change, including changing unequal social norms in institutions, communities, and the society is seldom the focus. While economic participation is an important concern for our country and the well-being of its citizens, the complex nature of, and interrelationships among these sociopolitical issues seem to warrant the development of knowledge that fosters critical thought among students and scholars in institutions and in communities and society. Such critical thought is essential for debate and critique and for identifying and developing interventions geared for social change (Moletsane, 2014). On one hand, research that focuses on understanding and explaining some of these social issues is abundant and useful in developing interventions. On the other, some scholars have questioned the conceptual and methodological basis of such knowledge, arguing that certain ways of knowing tend to be privileged while others are silenced. Critics, particularly those aligned to the indigenous knowledge systems and social justice frameworks, have often argued that academic research tends to marginalise the ways of knowing dominant among the local communities being studied, and to silence the voices of those most impacted by the social phenomena targeted for change. For example, as Mertens, Cram, and Chilisa (2013), citing the work of Ormond and Carter (2006), contended:

Research and the contestation over what counts as knowledge are just as implicated in the marginalisation of Indigenous peoples as are Christianity, disease, warfare, and constitutional manoeuvring. (p. 17)

Thus, as Muller (2000) noted, clearly both education and research for economic participation and for cultural and political participation are key to social change—and what is needed is a framework that considers them in tandem.

Implicit in the question, what knowledge is of most worth, are issues pertaining to the nature of knowledge and of power and its influence on knowledge production, dissemination, and legitimation.

What Is Knowledge Anyway?

There exist varied views on the nature of knowledge, internationally. One view is that, linked to the question of what and whose knowledge is of most worth, must be a critical view and understanding of what the concept *knowledge* means and how this has changed over time (Weiler, 2009; 2011). For Weiler, there has been considerable change in the concept over the past century and, unsurprisingly, such changes have tended to be mired in controversies. One such controversy was the paradigm wars of the 1980s (see Gage, 1989) “where the supremacy of quantitative research methods (mostly used to generate knowledge in the natural and health sciences) over qualitative methods (mostly used to generate knowledge in the social sciences and humanities) was debated” (Moletsane, 2014, p. 35). This debate about the rigour of particular kinds of knowledge but not of others (see, for example, Alise & Teddlie, 2010), is essentially concerned not only with “the epistemological foundations of our understanding of knowledge, but also with the way in which we assess different processes and institutional forms of knowledge production” (Weiler, 2011, p. 206). In addressing the question: “Whose knowledge is of most worth and who produces it?” Weiler (2009) implored us to understand that “the linkages between knowledge and power are both very intimate and very consequential, and that arriving at a better understanding of this linkage is crucial to any attempt to formulate a political theory of knowledge and its production” (pp. 1–2).

A second conception of knowledge distinguishes between two types: knowledge as outcome, and knowledge as procedure (Bleiklie & Byrkjeflot, 2002). In terms of knowledge as outcome, Bleiklie and Byrkjeflot quoted Bell’s (1973, p. 4) notion of knowledge as “a set of organised statements of fact or ideas.” Elaborating on this, these authors referred to practical knowledge, or utility-oriented knowledge, which focuses on getting things done or made. According to them, “‘knowledge’ has acquired a more all-encompassing meaning today” (p. 519). Logically, this would mean that society has confidence in, and support for, scholarship and the institutions that produce it. The opposite seems to have emerged, where, based on policy and public discourses, institutions of higher learning are increasingly criticised for their failure to contribute to building the economy (by, for example, producing a well-skilled workforce) and therefore, as not useful.

In terms of knowledge as procedure, citing Knorr Cetina’s (1999) notion of epistemic cultures, Bleiklie and Byrkjeflot (2002) focused on process, or on how epistemic cultures make knowledge in different ways. Citing Gibbons et al. (1994) in their book, *The New Production of Knowledge*, the authors noted a widening concept of knowledge that entails “a new form of knowledge production [made up of] a distinct set of cognitive and social practices” (Bleiklie & Byrkjeflot, 2002, p. 520). Gibbons et al.’s work distinguished between two modes of knowledge production. For them, Mode 1 focuses on disciplinary science and informs much academic research internationally. In contrast, Mode 2 knowledge production, characterised by both cognitive and social practices, is usually carried out in a context of application (rather than within an academic community), is transdisciplinary (rather than

disciplinary), heterogeneous (as opposed to homogeneous), hetero-hierarchical (rather than hierarchical) and is more socially accountable and reflexive (Bleiklie & Byrkjeflot, 2002, p. 520).

Commenting on this work and its influence on the South African research and academic agenda, Kraak (2000) noted that two global phenomena have influenced the emergence of Mode 2 knowledge production internationally: globalisation and democratisation. According to him, influenced by globalisation imperatives, education policy, and in turn knowledge production, tends to privilege this phenomenon and the knowledge economy—hence the emphasis on disciplinary knowledge (science) and innovation. Influenced by democratisation, education policy and related research have focused on the expansion of access to learning in higher education institutions (HEIs). Taking the cue from Scott (1995) and Gibbons et al. (1994), Kraak (2000) identified two ways in which the two phenomena have influenced education and research: first, a shift in the functioning and structure of HEIs from elite and insular institutions to more open and responsive systems; and, second, the emergence of a new mode of knowledge production (Mode 2) that is different from disciplinary science and research (Mode 1) and instead is, for example, problem solving and interdisciplinary in its approach—and produces knowledge on site to address the problem directly (Muller, 2000).

While the emergence of a problem-solving approach to knowledge production is promising in the context of South Africa's many socioeconomic challenges, Kraak's (2000) warning remains pertinent:

Even when academics are deeply engaged in Mode 2, the evidence is that they continue to value their standing and participation in professional societies, the values and norms of their academic disciplines, and they continue to extol the virtues of peer review. . . . [and of a Mode 1 intellectual climate] . . . In the most successful higher education units or departments this should not be surprising, since real status and reward attends their positions. (p. 61)

Thus, it might be safe to conclude that disciplinary science and, in particular, what is regarded as education and research for economic participation (Muller, 2000), continues to dominate the content of education and the focus of research in the academy. While education and research for cultural and political participation is increasingly making its mark in knowledge production and dissemination, as Muller (2000) concluded, it is only when the two (education and research for economic participation, and for cultural and political participation) are considered in tandem that our research and education efforts can contribute to the social change we desire and need.

A third conception, as Kumashiro (2002), Jansen (2009), and Zembylas (2013) noted, sees contemporary knowledge as, by its very nature, troubled and troubling. To illustrate, from intra- and inter-border conflicts and wars to, among others, disease, poverty, economic recessions, violent conflict, and crime, the world seems to be experiencing a traumatic and post-traumatic cultural moment (Worsham, 2006, as cited in Zembylas, 2013). Within this context, pain and suffering dominate the lives of individuals and groups in many places and spaces globally.

This conception also views knowledge as contested. As John Fiske (1989) asserted, "knowledge is never neutral, it never exists in an empiricist, objective relationship to the real. Knowledge is power, and the circulation of knowledge is part of the social distribution of power" (pp. 149–50). Influenced by this notion of the contested nature of knowledge and the power dynamics involved in such contestations based on class, race, gender, and religious inequalities, knowledge is seen as socially constructed. For Apple (2000) this meant that what counts as legitimate knowledge privileges the

views of the powerful in communities, institutions, and societies. The more powerful tend to determine the nature and content of knowledge and the strategies used to communicate it, and reject alternative or opposing views as illegitimate. Often the views of the less powerful are rejected as wrong and not to be regarded as knowledge. This, according to Bourdieu (1986), imposes “symbolic violence” on already marginalised groups. Symbolic violence is similar to the Marxist idea of “false consciousness,” and refers to a situation where, without any overt force or coercion, an individual or group accepts, internalises, and plays a role in its own subordination. As Connolly and Healy (2004) contended, such symbolic violence bolsters the position of the powerful and makes questioning the dominant worldview seem unacceptable and difficult.

Similarly, for Spivak (1988), the dominance of certain knowledges (of the powerful) and the marginalisation of others (of the less powerful) produces and is produced by epistemic violence. Taking up this notion of epistemic violence, Teo (2010) argued that it:

is produced when empirical data are interpreted as showing the inferiority of or problematises the Other, even when data allow for equally viable alternative interpretations. . . . Because the interpretations of data emerge from an academic context and thus are presented as knowledge, they are defined as epistemologically violent actions. (p. 295)

So, epistemic violence is related to who produces what is regarded as knowledge, or how power appropriates and conditions its production (Khatun, 1999). In the context of postcolonial and postapartheid South Africa, Spivak (1988) would argue, epistemic violence results when in (post)colonial discourse, the subaltern is silenced by both the colonial and indigenous patriarchal power. Such epistemic violence legitimates particular forms of knowledge and marginalises those who express alternative understandings. As such, symbolic and epistemic violence often positions the researched (individuals and communities outside the academy, including women, young people, and others) as the other (see also Moletsane, 2014).

Arguably, by privileging particular kinds of knowledge and marginalising others, symbolic and epistemic violence produces what Nigerian feminist author, Chimamanda Adichie (2009), referred to as *a single story*. To illustrate what she referred to as “The danger of a single story” she used her experience as a student in the USA and her first encounter with her American roommate:

What struck me was this: She had felt sorry for me even before she saw me. Her default position toward me, as an African, was a kind of patronizing, well-meaning, pity. My roommate had a single story of Africa. A single story of catastrophe. In this single story there was no possibility of Africans being similar to her, in any way. No possibility of feelings more complex than pity. No possibility of a connection as human equals. (2009, p. 2).

How do such single stories manifest in our research and teaching? How do they facilitate or prevent the desired social change in our institutions and the communities we research? Linked to the notion of what knowledge is of most worth is the equally important question, whose knowledge is of most worth, and who decides?

Whose Knowledge Is of Most Worth?

Whose knowledge is it anyway? asked Leonard Martin in an opinion piece published in the *Mail & Guardian* (2012). In his response, the author noted that global change and the emerging world order have implications for the kinds of knowledge needed for effecting social change. This new world order, he concluded, demands “a fundamental shift in intellectual engagement with knowledge” (2012, para. 4), one that would problematise the thinking that produces social problems such as violence against women, xenophobia, and other forms of violent conflict. For Martin:

“critical questions need to be posed to those who maintain, defend and produce the system of knowledge production. The values reproduced through the current system work simply to socialise people into limited expectations. [For example], whiteness and white privilege were “normalised” pedagogically and mediated with all the resources available to sustain an exploitative and unequal society. (2012, para. 5)

On the global academic platform, such assumptions of “whiteness,” some have argued, have allowed the North to define accepted norms and standards for knowledge production and dissemination while marginalising perspectives (usually those from the South) and “outside” world views and the knowledge they represent. As Moletsane (2014) argued, from this perspective these other at best need to be educated in and about the dominant knowledge and worldview, and to be persuaded or coerced, for example, through funding structures, to accept it or to face exclusion. In Bourdieu’s (1986) terms, with their cultural capital, researchers from the North are able to dictate how research should be conducted, who should do this, and what they need to demonstrate.

Using complex gatekeeping strategies, for example, the peer review process in academic journal publishing, particularly those regarded as “high impact,” and through funding structures, alternative voices are marginalised and excluded (see Fallabela Luco, Missana, Marilef, & Maurizi, 2009). Also, with national and institutional policy emphasis on quality in academic publications as encapsulated, for example, in the recently released *Research Outputs Policy* (Department of Higher Education and Training, 2015) and various institutional policies following from it, academics are expected to publish in peer-reviewed journals with a high impact factor. As Moletsane, Haysom, and Reddy (in press) noted, impact is calculated as comprising the average number of citations to articles. The higher the impact factor, the more respected the journal and the more legitimate the articles published in it. In this context, peer review (or refereeing) functions as a tool for quality control. As such, through peer review, manuscripts are assessed, critiqued, and either accepted or rejected (see also Thomson & Kamler, 2013) and the professional standing of the individual academic and his or her institution is determined. The peer review process produces and is produced by the power relations existing in the knowledge production arena with concomitant struggles and contestations among different groups, institutions, and geographic locations (Moletsane, Haysom, & Reddy, in press). For example, in her book, *Whose Science? Whose Knowledge? Thinking From Women’s Lives*, using feminist theories, Sandra Harding (1991) analysed the nature of knowledge and ways of knowing. Her work suggests that the production of knowledge is linked to its canonisation, for example, through organisation into systems of information and publications. Such canonisation enables the gatekeepers (peer reviewers and journal editors) to determine what knowledge and which knowers should be included or excluded. Macey (2000, p. 56), for example, concluded that “a canon is necessarily exclusive, [and] demands for its revision often take the form of a demand that it should be expanded to include works by authors from minority or marginalized groups.” Arguably, some scholars (for example, those in the global North) more than others (those in the South), with their attendant cultural capital and material resources, are better placed to master the requirements for such publication and to therefore access the journals, legitimising their knowledge and ways of knowing.

Within this context, various critiques of peer review in knowledge production and publishing have emerged (see for example, Falabella Luco et al., 2009). Their study found that such gatekeeping functions to sideline scholars from the South from knowledge production and dissemination in key platforms (particularly high impact peer-reviewed journals). With lower levels of cultural capital, characterised by language barriers (with English being the dominant language of research and publication worldwide), and the general marginalisation of knowledge produced by local Southern communities (Falabella Luco et al., 2009). The study also found that even when issues in Southern countries such as sexuality and gender are studied, the authorship in high impact peer-reviewed journals tends to be skewed in favour of the North. Furthermore, the study found that in terms of who writes about who, who has the resources for knowledge production and dissemination, and who decides what knowledge gets accepted and legitimised (through publication), English-speaking countries—the United States of America, followed by the United Kingdom and Australia—dominate (Adams, King, & Hook, 2010; Falabella Luco et al., 2009). In contrast, Southern voices remain on the margins.

In South Africa, the legacy of apartheid with its racial, gender, and social class inequalities have meant that black scholars and researchers, and black African women in particular, remain on the margins of knowledge production and dissemination (Moletsane et al., in press). Even more insidious, is the tendency for local (South African) scholars across racial lines to disregard the relative cultural capital and power they hold due to their academic, racial, gender, and social class positions, and its impact on the participation of local communities and extent to which local voices are then heard and taken seriously in research and the interventions it informs. Unless these spaces are interrogated, challenged, and transformed, the chances for real learning and social change remain distant.

The next section focuses on the how scholars in the South, and particularly social sciences and humanities researchers, might address the need for social change and the knowledge gap that perpetuates it in their research.

Towards Research for Social Change

How might sciences and humanities researchers including education scholars and activists, generally, and those in the Global South, in particular, advance the troubled and troubling knowledge they encounter in their work; and how might their work contribute to social change in the institutions and communities they work with? First, this article contends that there are various practices that tend to legitimise particular knowledges, rendering them of most worth—while marginalising others. In reordering the academic knowledge production and dissemination sphere, these need to be understood, explained, and challenged. In this regard, critical theory (and in development contexts, critical pedagogy) is useful. Martin's (2012) opinion piece implored us (through our education and scholarship) to strive to identify, explain, and challenge the factors that produce and make acceptable individual and group behaviours that disregard the lives and welfare of the other, often through violent means. Aligned to this idea is Steinberg and Kincheloe's (2010) conception of the need for critical theory in research. In these authors' view,

critical theory, if nothing else, is a moral construct designed to reduce human suffering in the world. In the critical theoretical context, every individual is granted dignity regardless of his or her location in the web of reality. Thus, the continuation of human suffering by conscious human decision is a morally unacceptable behaviour that must be analysed, interpreted and changed. (p. 140)

It is only when we understand the immorality of some of our decisions and actions and their negative impacts on others, and act to change them, that we can hope to effect real social change in institutions and communities.

Second, a key feature identified in this article is the unequal power dynamics inherent in knowledge production and dissemination, globally, and the consequent privileging of certain types of knowledge and ways of knowing at the expense of others. For example, unequal power relations between communities and outside researchers tend to limit or entirely discredit alternative local perspectives. Often, members of the communities in which we do research tend to possess lower literacy skills and may lack the confidence if not the ability to challenge, debate, or present alternative views on issues. Because of this, our research tends to disallow their perspectives, and their voices seldom make it to the knowledge we produce from their lives.

To address this, informed by Steinberg and Kinchoele's (2010) reconceptualised critical theory and Schratz and Walker's (1995) view of research as social change, as researchers and educators, our views about the people and contexts we do research on and in, need to shift. Rather than viewing them as needy and helpless subjects of our research gaze, we could ask ourselves: What would happen if we, instead, recognise and acknowledge them as dynamic individuals and groups capable of understanding and articulating their own issues, and as able to identify local solutions to address these? What would happen if we were to understand and develop a different kind of language and a different relation to their world? For example, using the generative theory of place (for example, the South and its people, the rural and its people, etc.) advanced by Balfour, Mitchell, and Moletsane (2008), we might engage in scholarship that views such spaces not only as subjects and contexts for research, but as dynamic and generative spaces and lived experiences. Such an understanding means that we would view the people themselves as capable of understanding and articulating issues affecting their lives as well as possible strategies for addressing them. This would produce the desired knowledge necessary for producing social change.

Available scholarship (e.g., Mitchell, De Lange, & Moletsane, 2014) also suggested that when we create safe spaces in our research and development projects for local people whose lives we are studying in order to enable them to engage in critical dialogue, we stand a better chance of effectively understanding their situation, and identifying and developing strategies for addressing the challenges that face them. However, if the dominant education worldview is about practical knowledge (i.e., developing skills for the workplace), and our research focuses on understanding and developing these, such an agenda might further victimise them and render them unable to engage in critical and contested debates. As stated above, power relations between community members as subjects of our research, as well as the dynamics inherent within these communities related to social inequalities (based on gender, race, social class, religion, and other markers of identity), often silence the less powerful and stifle the debate necessary for social change.

Third, this article has argued that Northern scholars tend to have more social (and cultural) capital than their Southern counterparts. This enables their research to make it through the gatekeeping structures that define what knowledge is, and what is of most worth. Locally, researchers from HEIs and research institutes, who themselves are often outsiders to these communities, also inform what knowledge makes it to the academy and, consequently, what counts as knowledge. For the South and for local communities (the subjects of such research), this means that people's realities are often defined and explained by outsiders and that the interventions that come their way, are likely to be irrelevant to their lives' needs. To address this, what is needed is context-specific knowledge, co-created and co-disseminated with the local people themselves. Such knowledge would help us ponder such question as what knowledge is produced, how and where it is produced, who produces

it, and under what sociocultural conditions it is produced. This would challenge and transform the colonising and marginalising knowledge production and dissemination processes that are often imposed on local communities in many research projects and interventions.

Fourth, a key focus in this article has not only been on what knowledge is of most worth in contemporary South Africa, but also whose knowledge is most valued. The discussion above suggests that the nature of knowledge tends to interact in very significant ways with power relations between the knowers and those whose lives form the content of such knowledge. It is only when we have adequately interrogated such power relations and their impact that we can challenge and transform them. Such transformation would then enable us to really hear the voices of our research participants and understand their experiences from their own perspectives. In this regard, as Maclure (1990) asserted more than two decades ago:

For marginal groups to improve their positions in society, the struggle is not restricted to economic and political spheres, but encompasses as well the realm of ideas, [with various implications for the work of] social scientists: that is, if their research is to contribute to [social change for marginalised] people, they must . . . develop new paradigms of inquiry and explanation . . . [informed by the actual] insights . . . of local people. (p. 2)

Linked to this, recognising the significance of the differential power relations inherent in knowledge production and dissemination, Briggs and Sharp (2004) concluded that:

Indigenous knowledges all over the world are malleable, changing in response to Western ideas and practices, but also to an ever changing array of other ways of knowing and doing. . . . Thus we must not underestimate the significance of material conditions which influence the need for different knowledges. Indigenous knowledge cannot ever be understood in isolation of the critical analysis of economic, social, cultural and political conditions. As Agrawal argues, indigenous knowledge is not simply about language and expression, but about these material conditions through which people must survive. (p. 17)

Thus, indigenous knowledge systems and, in particular, Smith's (1999) notion of "decolonising methodologies" and Chilisa's (2008) indigenous methodologies are pertinent.

Conclusion

This article has addressed three interrelated questions: What and whose knowledge is of most worth in the South African academic landscape? Linked to this, it has asked: What is the nature of knowledge and how does this interact with the power dynamics inherent within institutions and communities and between Northern scholars and their scholarship? The third question asks scholars in the South to speak back and challenge the hegemony of the North in the question: How might social sciences and humanities researchers including education scholars and activists, generally, and those in the global South, in particular, advance the troubled and troubling knowledge they encounter in their work, and how might their work contribute to social change in the institutions and communities they work with? While the strategies identified and discussed in the above section relate to the paradigmatic and theoretical level, they have several implications for the epistemological and methodological choices needed towards what Moletsane (2014) referred to as "untroubling" of knowledge production and dissemination for social change. This involves

methodologies that would ensure that we really hear the perspectives of all in the institutions and communities we work with, but also that, in recognising the contested nature of local interpretations and knowledge generally, we actively enable participants to confront, critique, and challenge such understandings in order to develop alternative understandings. This means that members of communities must be able to meaningfully participate in all activities meant to achieve this. For Moletsane (2014), this involved thinking outside our taken-for-granted realities and understandings and instead using the actual insights of local community members to radically transform the nature of our research, the methods we use to collect and analyse it, and throughout this process, co-creating and co-analysing our findings with our participants.

For Cornwall and Jewkes (1995), participatory research and practice enables participants and researchers to reflect and act together from research planning through to analysis and dissemination. Informed by the notion, “nothing about us without us,” such co-creation and co-dissemination of knowledge ensures control of content and process by both researchers and participants and consequently, mutual learning among them. Examples of participatory methodologies abound in the emerging literature. These include visual methodologies such as photovoice (Wang, Burris, & Xiang, 1996), participatory video (Milne, Mitchell, & De Lange, 2012), cellphilms (Mitchell, de Lange, Moletsane, & Stuart (2013), drawing (Theron, Mitchell, Smith, & Stuart, 2011), and storytelling, including digital storytelling (de Tolly, 2007). It is not enough to use these tools in our research, rather, what is needed is the co-reflection with our participants on the research process itself, the power dynamics inherent therein, and the extent to which these tools enable us to challenge and address these so as to pave way for democratic decision making about the strategies needed for social change.

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Looking at Showing: On the Politics and Pedagogy of Exhibiting in Community-Based Research and Work With Policy Makers

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Abstract

This article responds most directly to projects of visual art making (digital stories, participatory videos, cellphilms, photography) where either virtual or physical exhibitions are seen to be central to reaching audiences, particularly community leaders and other policy makers, as part of the process of social change. For social science researchers working in the area of participatory visual research, the idea of the exhibition has increasingly come to be regarded as an essential component of such projects. However, the role of exhibiting and engaging audiences is, to date, an understudied area in social research. How can exhibiting be seen as central to the work and not just an afterthought? Building on the literature of vernacular photography, and using one case of multiple showings of a travelling exhibition, the article addresses the politics, procedures, and pedagogy of exhibiting and curating in visual research in educational settings.

Keywords: Educational setting, exhibition, participatory visual research, pedagogy, social change

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Introduction

I begin this article on the politics and pedagogy of exhibiting visual images to various audiences in community-based research by reflecting on an experience involving the Research Ethics Board (REB) of my university. As a researcher working in the area of participatory visual research to address sensitive issues such as gender-based violence and stigma in HIV and AIDS, I am used to addressing what often seems the trickiness of working with visual data, and the challenge of doing most good and least harm (see Mitchell, 2011; Mitchell, de Lange, & Nguyen, in press; Moletsane, Mitchell, Smith, & Chisholm, 2008). This ranges from ensuring that the rights of those who might be photographed are respected (and hence, the establishment of strategies such as a “no faces” protocol), to ensuring that the rights of the photographers themselves are respected, especially in relation to ownership of the photos and in terms of determining which photos might be exhibited and where. Both these concerns were central to an ethics application where I was proposing to carry out a participatory visual research study involving two groups of participants: girls and young women producing visual productions such as photos (and photo exhibitions) in relation to gender based violence, and a group of policy makers and community members who would be viewing these visual productions. This was not the first time that I had applied to the REB to conduct participatory visual research linked to sexual violence, and my colleagues and I have been moved and, indeed, haunted, as Susan Sontag (2004) described, it by the very compelling and provocative drawings, photographs, and videos produced by participants (Mitchell, 2007; Mitchell, 2011). What caught me off guard when I heard back from the Research Ethics Board, was a comment about the audience participants (adult policy makers and community members) and the fact that they could be at risk in viewing the images. As the review panel noted, “Given the sensitive nature of the photographs or other visual images, how will you ensure that the vulnerability of audience members, who may themselves have been victims of sexual violence, is addressed?” (Personal communication, March 2015).¹ Aside from the slight irritation at having to resubmit the application with an amendment on how I would address the review panel’s concerns, I wanted to cheer. After writing with coauthors for years about “Why the visual?” and the potential impact of the visual, this was the first time that a committee had gone beyond challenging the risks involved in taking the photos (or producing a video) to the risks of seeing the photos (or viewing the video).

This episode may seem like a very small (and slightly fraught) victory, but in a field that often overplays and romanticises some aspects of participatory visual research (see Low, Brushwood, Salvio, & Palacios, 2012), the experience felt like the equivalent of winning the Pulitzer Prize. Indeed, as I explore in this article, when the agenda of social research is one of social change and transformation it is somewhat paradoxical that “audiencing,” as Rose (2012, p. 25) termed it, is perhaps the least studied area of participatory visual research. By this, I do not mean to minimise the potential for transformation and social change in relation to the image makers and the process of image making. The use of photography in photovoice, participatory video (including the use of mobile phone devices), digital storytelling, drawing, and mapping have all been shown to be effective in engaging community participants as image makers—and, especially, in altering some of the typical power dynamics related to the researched–researcher, and to ensuring spaces for marginalised populations to both speak about and then “speak back” through interactive workshop sessions to social conditions. The products—videos, digital stories, drawings, photos and photo exhibitions—are ideally suited to be seen.

¹ The significance of secondary trauma through exhibiting graphic content such as might be seen in images of abused women or children has also been recognised by organisers of conferences on sexual violence, with presenters being asked to carefully consider the images they might choose to show in, for example, PowerPoint presentations.

But what do we as social scientists know about showing and exhibiting, and how can we deepen an understanding of engaging various audiences including policy makers? Given the ambitious and hopeful aspects of participatory research to influence policy, it is a critical (but often overlooked) area of investigation, although, if we look back at the early work of Caroline Wang (1999) and others, the engagement factor has always been there. The engagement factor is also implicit in the idea of grassroots policy making (see Choudry & Kapoor, 2010). However, as Ray Rist (2003) observed,

There is no broad-based and sustained tradition within contemporary social science of focusing qualitative work specifically on policy issues, especially given the real time constraints that the policy process necessitates. Yet it is also clear that the opportunities are multiple for such contributions to be made. (p. 641)

Participatory visual research is an area of research where, clearly, there is the potential to influence policy dialogue. However, there are also, as the editors of this special issue of *Educational Research for Social Change* suggest, new topics to be explored. In particular, I am interested in the kind of research that should be undertaken to study policy dialogue in facilitating social change.

This article is meant to be conceptual and reflexive rather than empirical, although I do draw on empirical data in order to shed light on the overlap between showing (exhibiting and screening) and engaging audience as both critical stages in participatory visual research, and in studying the notion of social change. In the first section, I situate the field of exhibiting, drawing together literature from both the humanities and the social sciences in order to clearly locate the questions of “Why exhibitions?” and “Why audiences?” and “Why the need for terminology to describe this work?” In so doing I propose the idea of “circulating the vernacular” to describe the process. In the second section, I offer a reflexive account of one exhibition with multiple showings as a way to explore circulating the vernacular. In the third section, I offer what might be read as a tentative framework for audience studies, as applied to community-based research.

Exhibiting in Participatory Visual Studies

This article does not seek to challenge (or replicate) the rich and vast body of work in the arts focusing on curation and exhibiting. In this broad field of study in areas such as art history, fine arts, and museum studies, clearly the politics of representation is critical and there are, of course, implications for exhibiting and cocuration in community-based research in everything from the technical aspects of mounting and framing photos, through to creating captions and curatorial statements. It is worth noting that there is a rich body of work on audience in such areas as film and television (Buckingham, 1987; Fiske, 1994; Rose, 2012). However, there has been much less written on the audiences of community-based research. However, as various researchers working in participatory visual research are acknowledging, exhibiting in community-based research brings with it other complexities. The anecdote that I offered above, of the REB at my university concerned about the impact of photos on adult audiences (community leaders and policy makers) taken by girls and young women (even if there are no faces and no identification of the photographers) from the same community, is just one small piece of the picture. Delgado (2015) in his comprehensive study of photovoice work with urban youth acknowledged the significance of the exhibiting phase in photovoice work. In so doing, he drew together various studies that include reference to exhibiting (see, for example, Kay, 2013). As he observed: “Photovoice findings must be exhibited and distributed in a manner that reflects culture-and-community-specific preferences for communication” (p. 97). As he went on to write, “Having an exhibition boycotted because of its controversial content, or, even worse, simply ignored, with minimal attendance and no media coverage, can have a long lasting impact on the participants” (p. 99). Perhaps the most compelling

point is one that he shared from the work of Haw (2008), and the idea that the opposite of having a voice is being silenced. Failure to come up with a way for photos to reach appropriate audiences is part of that silencing.

However, although there is an emerging body of work on exhibiting in community-based research that highlights the rationale and why it is important to the participants and to the process as a whole and the technical aspects of exhibiting, it is an area that is rarely studied on its own. A significant and exciting exception is a recent chapter by Reinikainen and Zetterström-Dahlqvist (in press) who offered an autoethnographic account of curating, as social scientists, an exhibition of photos based on an album project carried out with six colleagues at the University of Mid Sweden. As they commented:

During the preparation of the exhibition, as we took field notes and produced photographs and videos of the process, we reflected on how we would actually write about the production of the exhibition. This means that there have been, basically, three different temporal dimensions of self-reflexivity related to these processes. One temporal dimension related to the past, that is, the actual curating of the albums as an emotional journey to be considered in the curation of the exhibition process. Another time dimension related to the present—the curation (or the doing) of the exhibition and, finally, the third related to the future—how will we write about it? However, our point of departure was in the present, that is, in the actual process of producing the exhibition while, at the same time, reflecting back to the past and into the future. (n. p.)

While the photos in the exhibition all came from family collections of photos rather than from photovoice images, the process of creating the albums was a visual method that is not that different from photovoice itself (see Mitchell & Allnutt, 2008; Mitchell, Weber, & Pithouse, 2009). Relevant to this article, (in both the exhibiting of album photos and photovoice images) there is what Catherine Zuromskis (2013) described as the “contentious relationship between photography’s vernacular culture [the snapshot] and the aestheticising function of the museum [public display]” (p. 119). In exploring this idea of studying the engagement of audiences viewing photographs and other visual images, I have been interested in what Zuromskis termed “aestheticizing the vernacular” (p. 118), focusing on what happens when ordinary people’s everyday snapshots are exhibited in art galleries and other public spaces for viewing. In her book, *Snapshot Photography: The Lives of Images*, she drew on the work of Geoffrey Batchen (2001) and others to study several well-known international exhibitions made up of snapshots, ranging from the *Family of Man* exhibition of the 1950s, which toured for 8 years and in 63 countries, to the more recent *Pictures That Matter* exhibition, mounted after the attack on the World Trade Centre in New York in 2001.

While her work on vernacular images is relevant to studying the production and use of images by community members, its application to engaging local audiences, and especially policy makers, in community-based research is somewhat limited for several reasons. First, unlike the image makers of many family snapshots, the participants in photovoice projects typically are interrogating a social issue that is critical to their well-being (safety and security, health, environmental issues, stigma, or sexual violence) and about which they wish to speak, and in relation to various community actors. A typical stage in the image-making process is to consider questions such as “How can these issues be changed?” “Who should see these pictures?” “What can we do and what do we want others to do?” Thus, unlike Steichen’s *Family of Man* exhibition where he as the curator had the idea of exploring the “universal language” (Steichen as cited in Zuromskis, 2013, p. 124) of photographs, presenting a world, as Zuromskis observed “as a global community, a ‘family’ united by the supposedly fundamental experiences of birth, death, work, play, war, marriage, procreation and the like” (p.

124), in a participatory visual project, it is the image makers who determine what the angle or point is of the exhibition. Second, unlike the audiences for many of the exhibitions that Zuromskis described, where the viewers may not be from the local areas, in community-based research where there are local exhibitions, the audience members (even local policy makers) may be known, and viewers may know the image makers. Indeed, typically, the image makers will be present for the exhibition. Third, and critically, the image makers may expect something to come out of their exhibition besides appreciation. Each of these contextual factors alters the relationship between the image maker and the audience.

Building on Zuromskis' idea of naming what it is that we are doing in exhibiting in relation to audiences, I propose that as a community of scholars we consider attempting to "name" and study our work with audiences and exhibitions in participatory visual research and social change. The term, circulating the vernacular (as opposed to aestheticising the vernacular), may be a start, highlighting, first, the ways in which the images produced by ordinary citizens (as opposed to professional artists) are still the vernacular but, second, that if they are to have impact, they need to circulate, be seen "over and over and over again."² Circulating may take place at different sites, and to many different audiences. But the circulating can also take place through different modalities. For example, images and captions may become integrated into what I have termed "digital dialogue tools"—digital media productions that incorporate the images and captions and which, typically, are then screened for various audiences and followed by discussion. As I have described elsewhere (Mitchell, 2014), digital dialogue tools are short digital productions (sound and image) that draw together or organise visual data for the purposes of engaging image makers in participatory analysis, and which could also be used with various audiences (communities, policy makers) as a way to offer a larger than life screening of the images.³ They may also be reformatted and packaged into an exhibition catalogue so that audiences may view them in less public settings (see de Lange, Nguyen, Mitchell, & Nguyen, 2014).

Circulating the Vernacular: One Set of Photos, Multiple Showings

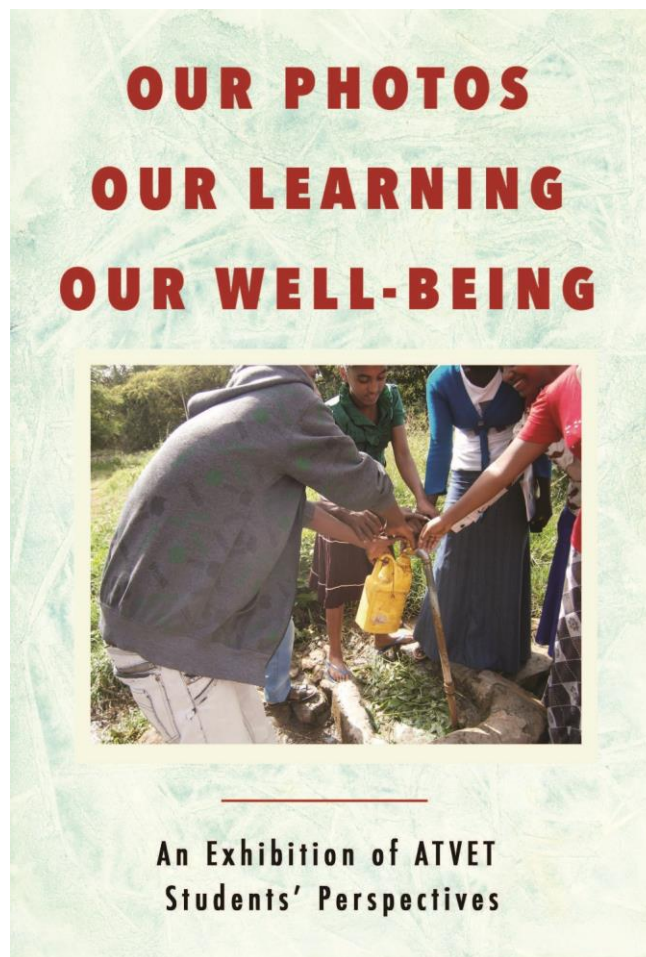
Inspired by the work of Reinikainen and Zetterström-Dahlqvist (in press) in relation to reflexivity and exhibiting, and by Zuromskis' study of different exhibitions and exhibiting sites, I focus here on the exhibiting of one photovoice exhibition, *Our Photos, Our Learning, Our Well-Being*. The images in the exhibition were produced by 80 young people in Ethiopia enrolled in Agricultural Technical and Vocational Education Training (ATVET) at four ATVET Colleges. The four ATVETs, as part of a Canadian-funded study, were participating in a needs-assessment exercise. Given that young people are the main clients of the ATVETS, it was critical to get their perspectives on what it meant to be a male or female student attending an ATVET. Working in small photovoice groups of three or four youth, the image makers first took photos and then had chance to explain their images to the rest of the larger group, and to consider what their photos might mean in relation to changes in the ATVET. At the time of the needs assessment, the research team working with each of the ATVETs drew on the themes in the photos to deepen an understanding of the gender context of the ATVETs, and to build into the follow-up programming ideas that could respond to the concerns raised by the youth. However, it became clear that the collection of photos could have uses beyond the initial needs assessment, ranging from giving a face to the project at the time of a public launch in Canada, to becoming a tool for self-study for the institutions themselves. To address this dual focus, team members working on the project designed an exhibition, drawing together a number of key themes found in the images: the significance of surroundings (with many photos highlighting issues of water

² Here I acknowledge the rich discussions at the HEAIDS HIV and AIDS Educators Community of Practice workshop at Nelson Mandela Metropolitan University, 19–20 March, 2015 about exhibiting *Seeing, Believing and Acting for Change—Integrating HIV and AIDS in Higher Education Curriculum* over and over and over again.

³ See for example *Picturing Inclusion: Voice of Girls with Disabilities*.

and sanitation); knowledge being gained in such areas as environmental issues, issues of health and well-being (including sexual violence); and barriers to learning (inadequate technology, lack of teacher support). The images and captions were represented on large posters (size, 27 inches by 40 inches).

Figure 1. Title Poster for the Exhibition



Method

In this section I draw on field notes of impressions and reflections on conversations that I produced in relation to the exhibiting of *Our Photos, Our Learning, Our Well-Being* in several different sites and over several months.

Exhibition Site One.

The first exhibiting of *Our Photos, Our Learning, Our Well-Being* took place in conjunction with the launch of the project in Canada, and at which at least four faculty members from each ATVET were in attendance. Because the faculty members were otherwise going to be seeing the images for the first time at the launch event, it was important for them to preview how their students regarded their learning. This was particularly important because some of the images were very critical (concerned about the food insecurity in relation to living in residence, sexual violence, absentee instructors) of a specific ATVET (even though no names were used). In fact, even before we unveiled the exhibition to the faculty members, my colleagues and I decided to leave out a set of two posters that deal entirely

with images of dirty and inadequate toilets and lack of water. One colleague commented that perhaps these images simply reinforce images of Ethiopia, the othering of “over there,” and that perhaps for this Canadian audience were not appropriate. Together, we also wondered how the ATVET faculty themselves would feel about having those particular photos exhibited:

My first thought is, ‘but the students took these photos. Is it fair to now not show them?’ But then I think that they were taking the photos for a needs assessment. They had been asked to be honest and take pictures of their concerns. X is right. Are these images really appropriate for this audience? Is this some type of National Geographic portrayal? Why didn’t I notice the cumulative effect of 15 images of dirty toilets when we put that set of posters together? Maybe the 15 images spread out would be different, but all together on two large posters they seem larger than life. (Author fieldnotes, January 2015)

When the various faculty members viewed the images they expressed a sense of being pleasantly surprised about the photography skills of the students, but also about how much their students knew about topics such as climate change and environmental issues. At the same time, and just as my colleague had predicted, they were concerned about some of the pictures although not necessarily the ones we had identified. One photo in particular shows an image of a chair with a half-empty plate on it and the rest of the dining hall in the background. The student who took the pictures offers a caption about the lack of food available.

Three of the faculty members are clustered around the image. One is adamant that it should be taken down. For one thing, he says, the student who took the picture should not be showing a picture of a plate on a chair. Why doesn’t the student clean it up instead? A colleague assures him that, actually, this is how things are and we should all be open to looking at the truth. It is a back and forth dispute and, as an outsider, I stay out of it but in my heart, I am hoping that they will agree to leave the image. It is only the next day at the time of the launch I learn the outcome. The person who is most adamant about removing the picture asks if he can say something to the assembled group of dignitaries, and makes a comment that although many of the images of the colleges are very negative in that they show problems with sanitation, and it is too bad the students had to take them, that perhaps at the end of the six years of the project they will be taking different pictures. I heave a sigh of relief but I find myself compelled to also say something to the group: ‘These are the pictures a group of ATVET students take on “being a male or female student.” We have had, in the last month, a great deal of media coverage about sexual violence on Canadian campuses. What would happen if we gave cameras to our students attending Canadian institutions?’ (Author fieldnotes, January 2015)

Figure 2. Audience Members at Canadian Exhibition of *Our Photos, Our Learning, Our Well-Being*



Exhibition Site Two.

The second time *Our Photos, Our Learning, Our Well-Being* is exhibited, it is in Ethiopia at an event where all the deans come together for a week-long training session—again along with approximately eight staff members from each of the four ATVETs. This time all of the posters are already set up.

This is a completely different showing. The faculty members who went to Canada are back looking at their photos but this time they themselves are part of the history of the exhibition. They have seen it before and we even have images of them looking at the exhibition when it was set up in Canada. Although there is no identifying information in any of the posters as to which ATVET is involved, in this exhibition it is clear that everyone wants to find his or her college. It is not so much how it is represented, but that it is represented. (Author fieldnotes, April 2015)

Figure 3. *Our Photos, Our Learning, Our Well-Being*: Launch of Exhibition in Ethiopia



Exhibition Site Three.

During the course of the training session referred to above (and by consensus) the group decide to turn the exhibition into a travelling exhibition and have it travel to each of the ATVETs where the students who produced the images, along with other students and faculty members, can view it. They agree that it will be useful for each ATVET to document the process, and as a group we come up with a common set of questions as indicated in Table 1:

Table 1: Tracking Screenings

1	Where at your college was the exhibition held?
2	Who attended? (Males? Females? Lecturer? Management? Students?)
3	How long did you leave the exhibition up?
4	Did you hold any special event(s) to coincide with putting up the exhibition?
5	What was the overall response to the exhibition?
6	Which photos did the people choose to focus on and talk about?
7	What did the audiences think the students were trying to say through their photos about being a male or female student at an ATVET?
8	What actions did people suggest were necessary to address the concerns of the students?

In the first report back from one of the colleges, I learn that more than 500 students and 60 instructors view the exhibition over four days. The college also sends along a large collection of photos of various audiences looking at the exhibition.

Figure 4. Exhibition of Our Photos, Our Learning, Our Well-Being at an ATVET

Although I don't get to see the exhibition at X in action, I am excited by the first report when it comes in, and the fact that it is full of pictures of people viewing the exhibition. A recurring comment in response to the questions highlights the need to keep doing activities like this. This is a different take on the over and over and over. We need lots of exhibitions and lots of different ways for people to engage—and together. (Author fieldnotes, May 2015)

Towards a Framework for Circulating the Vernacular in Studying Audiences

In reflecting on the exhibiting of *Our Photos, Our Learning, Our Well-Being* across several sites, I want to suggest a series of stages in audience studies, as Rose (2012) and others termed this type of work, for looking at audience engagement.

Stage One: Researcher reflexivity.

As I have tried to demonstrate in the previous section, as a starting point in this work, we can begin with ourselves and our own reflections as researchers. What can we learn by looking inward, and how can we contribute to a cumulative body of knowledge about audience engagement through our own first-person reflexive accounts? Rose (2001) highlighted the reflexive work of Valerie Walkerdine (1997) when she carried out an ethnographic study of a family viewing the video, *Rocky II*, and noted that this type of reflexive work is rare in audience studies. More recently, MacEntee and Mandrona (in press) reflected on three different sites where a group of South Africa teachers screen their self-produced cellfilm videos about HIV and AIDS to groups of learners. Their work serves as an exemplar for tracking a set of screenings. In another South Africa study, a group of teacher educators offer a collaborative and reflexive account of multiple screenings of their digital animation production, *Take a Risk: It's as Easy as ABC* (Mudaly, Mitchell, Pithouse-Morgan, Reddy, & van Laren, in press; Pithouse-Morgan, van Laren, Mitchell, Mudaly, & Singh, in press).

Stage Two: Participant reflections.

While it is not so apparent in the fieldwork described above—except in the sense that the faculty members (who were not the image makers) from the various colleges had the opportunity to set up and reflect on the exhibition, *Our Photos, Our Learning, Our Well-Being*—elsewhere, we have documented the reflections of the image makers in another study screening or exhibiting their productions. As an important component of the *Taking Action 2* project, for example, a study with indigenous youth from across Canada producing their own digital stories about taking leadership in the area of HIV and AIDS, young people had an opportunity to screen their digital stories in their own communities. In such work, we have an opportunity to learn from the participants what it felt like presenting their work to local communities, and their own engagement with those local audiences (Flicker et al., 2014).

Stage Three: Studying audiences directly.

Clearly we need to document directly, where possible, what audiences have to say. We can use a variety of tools to do this, ranging from questionnaires to actual face-to-face interviews. In the case of policy makers, for example, how do they regard the images? Which images have an impact on them, and why? How do they feel about the images and the image making? Are there certain images that offer new perspectives? And of course, critically, what do they intend to do (if anything) as a result of seeing an exhibition? This may be work that is complex, because the answers may depend on who is asking the questions. In a sense, image makers in photovoice or participatory video projects are studying up in that they are likely to be seeking to influence a group that often has more power and more status (see Nader, 1972; Williams, 2012). Rivard, in her photovoice study of how adolescent girls in Rwanda regard physical activity and sport, carried out face-to-face interviews with policy makers, making sure that they actually engaged with the photo images (Rivard & Mitchell, 2013). Using photo-reports as she terms them, she had each policy maker individually look at the photo-reports, and she also left a copy of the photo-report with the policy maker. What the next step would be is to study the impact of the images on the policy maker, and the dialogue or actions (if any) that might have come out of this process.

There may be other stages that emerge in the study of circulating the vernacular, but these are three that should be able to find their way into the design of most participatory visual studies seeking to study the idea of audience in relation to impact and change. Given that there is so much now written about the image-making process, we may be able to move more towards Rose's (2012) idea of audiencing. These stages draw attention to the role of the researcher, the image makers, and the audience participants in deepening an understanding of social change.

Conclusion

In this article, I have focused on studying the engagement of audiences in participatory visual research. Studying audiences is, of course, only one way to look at the issue of impact and change beyond the transformative possibilities for the image makers themselves. For example, we might embark on studies where we track policy change and change that comes about as a result of an intervention. In a visual essay, "Seeing How It Works" (De Lange, Moletsane, & Mitchell, in press), we attempted to document, through work with the image makers themselves, the changes that occurred as a result of an intervention. In that study, the *Girls Leading Change* project, 14 young women studying at a South African university produced cellfilms, policy posters, and action briefs related to sexual violence on campus. After presenting their findings and action briefs over and over and over again to policy makers on campus and over a period of time, they documented, visually, some of the changes to the campus such as a posting of new rules about male visitors to their residence, and an image of a stairwell that has now been cleaned up and is better lit.

Clearly, however, the broad areas of studying change and studying audience remains relatively under-studied and there is a need for methods and tools. In naming this as circulating the vernacular, it is possible to begin to study the nature of circulating images in community research by posing new questions: What does it mean to circulate images in and through various communities? What modalities work best? What approaches work most effectively in studying audiences? Several years ago when I concluded a book on visual research (Mitchell, 2011) with a chapter on exhibitions, I focused much more on the place of exhibitions in working with the image makers and very little on dialogue and engagement with audiences. However, I did observe that it seemed to me that there was a need for a new area of study, broadly framed as "display-as-inquiry" (p. 198), which draws together "technical issues and participatory processes and policy dialogue" (198). The ideas that I have mapped out here on circulating the vernacular take us one step further in this work. As noted earlier in the article, the question of what kind of research needs to be undertaken to facilitate social change is a critical one for social science research, particularly in relation to the burgeoning area of participatory visual research. Deepening an understanding of those making the images, and those engaging with the images, can offer an even richer picture for visioning and re-visioning research for social change.

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Hacking Through Academedia: Autoethnography, Data and Social Change

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Abstract

The question of who may produce and own knowledge, under what conditions, is critically discussed in relation to research regulatory regimes and academic managerialism. The nature of researcher position and nature of researcher–researched encounters is discussed. Autoethnography is offered as one way of examining self–other relationships in doing fieldwork. How to negotiate the relationship is examined in the context of indigenous knowledge systems (IKS) and the questions of essentialism and paradigm clash. The dominant ideology of data is questioned. Case studies of how (over)regulation excludes unconventional science from its system of rewards illustrates the contradictions imposed by residues of positivism.

Keywords: autoethnography, indigenous knowledge, positivism, data, field research

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Introduction

This intervention addresses who may produce and own knowledge, and who may disseminate knowledge for social change. My argument reflects my own experience in which I try to balance between data-led, quantitative research on the one hand and critical indigenous qualitative methodologies (CIQM) on the other. Both approaches are institutionally regulated: where positivism fits in easily with regulation, CIQM tests and contests the assumptions and auditing regimes that limit the boundaries of inquiry. In addressing these issues, my exploration addresses the contradictions that emerge via the metaphors of researchers as flies-on-the wall (the objective gaze) or as flies-in-the-soup (the subjective experience).

Where's the Researcher?

One of the glaring weaknesses of conventional scientific methods is that they totally ignore researcher position, researcher–researched relations, and how encounters are shaped by the dynamic nature of the relationship with those subjected to the scientific gaze. Most methods textbooks assume that the academic enterprise is inexorably rational, coherent, and impartial—the only way of finding out. The inevitability of numerical analysis is often taken for granted. These kinds of approaches assume a supposedly objective all-seeing and supposedly objective fly-on-the-wall. However, socially immersed researchers are more like flies-in-the-soup, swimming around, trying to make sense of the sticky, tactile, enveloping, and more often than not, bewildering field experience.

Conventional methods often lack a sense of history, feeling, and intuition. Data is considered objective, discrete and factual, self-evident and true, rather than being an instrumentalist indicator of bygone positivist, and later, modernist ages. Positivism, proposed by August Comte (1865/2009), projected the existence of a real, referable world separate from human consciousness that can become known via experimental methods, hypothesis testing, with the data so generated being subjected to verification. Positivism claims to be neutral, value free, confirmed by the fly-on-the-wall oversight, that is, free from the subjective bias of the researcher (who is usually in the soup but whose methodology conceals this location). However, data is not axiomatically impartial—someone designed the instruments to find it, organise and code it, and then interpret it.

Conventional science limits the production of certified knowledge to an approved social class that is licensed to work in educational institutions. Further, despite the lessons of post-structuralism and other recent postparadigmatic innovations, conventional science still discredits, even disparages, forms of knowledge generation that break with positivist frameworks. Orthodox approaches also rarely discuss failure, negative results, or admit that “findings” cannot always be found. Order (science) is imposed over disorder (the experiential) and the mess and confusion of quotidian life is concealed because these conditions obscure the clarity of structure.

Ways of knowing are always partial, relational, and in the process of becoming. All of these ways—as methods—centre on the researcher–researched relationship, and how this is negotiated. The gluey metaphor of the fly-in-the-soup best describes the social sciences researcher position. In sociology and anthropology, for example, the methods of autoethnography, self-reflexivity, critical indigenous qualitative methods, and lived research, amongst others, are now gaining respectability as relational ways of knowing—as means of reinserting researchers back into analysis. Positivism, in contrast, conceals researcher presence by claiming absence—the fly-on-the-wall approach.

Autoethnography—which in our approach self-reflexively examines self–other relations—is being increasingly applied in order to fracture received notions about science, objectivity, and validity,

including in South Africa (Mboti, 2012; Tomaselli, Dyll, & Francis, 2008). As both methodology and genre of writing, autoethnography “displays multiple layers of consciousness, connecting the personal to the cultural” (Ellis & Bochner, 2000, p. 739). As Lauren Dyll-Myklebust and I (in press) explained the term: *auto* = self; *ethnos* = culture; *graphy* = process. The auto/self and ethnos/culture components work together as a process (graphy). As Carolyn Ellis and Arthur Bochner (2000, p. 739) put it:

Back and forth autoethnographers gaze, first through an ethnographic wide-angle lens, focusing outward on social and cultural aspects of their personal experience; then, they look inward, exposing a vulnerable self that is moved by and may move through, refract, and resist cultural interpretations.

Autoethnography thus is part of wider qualitative research and retains the ethnographic objective of “seeking to understand and make sense of complex social worlds of which we are only part (but part nonetheless)” (Atkinson, Coffey, & Delamont, 2003, p. 33). The central tenet of autoethnography, thus, is that researchers recognise themselves in their research practices. My approach here is to examine my own responses of autonomy and resistance as I battle positivism and neoliberal managerialism that denies critical indigenous methodologies that admit the social worlds of which academics are part (Anderson, 2006; Tomaselli, 2012a). This is the backdrop for autoethnography’s analytic subgenre.

Reflexivity guides and problematises our positions as scholars, educators, or administrators within research practices that involve participants. As acts of self-reference where research “bends back on,” refers to, and affects the object/unit/person initiating the study, self-reflexive researchers not only reflect upon their own subjectivities and how these affect research practices, but are additionally mindful of the scholar’s connection to the research situation and influences upon it. In self-reflexivity, researchers “systematically and rigorously reveal their methodology and themselves as the instrument of data generation” (Ruby, 1980, p. 153).

By connecting the personal to the cultural and then to the political, I hope to offer some novel—if incomplete—insights that address the theme of this special issue. No findings are offered; rather, a relational set of ideas are placed on the agenda for further discussion. My examples that elaborate analytical ethnography will be to examine academia itself—of which I have been a “full member” (Anderson, 2006) as a student, lecturer, and professor for nearly 50 years.

Academentia

The nature of the academic institution has changed fundamentally since the end of the Cold War after 1990. The contemporary academy is ruled by an unforgiving audit culture, the tyranny of data generation, and managerialism discursively disguised as “transformation” (Makgoba & Mubangizi, 2010). Few managers think like educators or intellectuals any more. Rather, they “think with data,” impose reporting regimes and endless form filling, and measure academic activity through frameworks called productivity units, like in a factory. Input and output indicators, key performance areas, and other measuring instruments now box academics into predetermined ways of thinking, doing and accounting, and justifying their activities. Where universities claim to permit academic freedom in curricula and research, many actively punish critique by their own employees of their management and administrative practices (see Chetty & Merrett, 2014). The tertiary industry, thus, exhibits a contradictory postpositivist consciousness: it promotes innovative thinking and teaching on the one hand, but increasingly is suppressing dissent by employees of their own institution’s management practices, and is strangling free-flowing research that wants to evade positivist

containment. Community engagements, unless directly generating publications and working for social change whether on or off campus, are often the casualties of these kinds of positivist residues and their surveillance systems, even if they are sensibly intended to ensure that everyone does an equitable day's work and do not expose institutions to legal liability—yet another new factor impacting the academy.

Some in the humanities have resisted this kind of creeping managerialism, promoting *unruly pedagogies*. For Bethlehem and Harris (2012, p. 3), who edited a special issue of *Critical Arts* on this topic, the questions were:

To what extent is our teaching in the cultural studies classroom predicated on the possible political transformation of teachers, students and the body of knowledge around which we meet? Considered from the vantage point of an ethical turn in cultural studies praxis, to whom are we responsible in the classroom? And beyond it? Is a sentient pedagogy necessarily unruly or disruptive? How might we weigh 'disruption'?

These kinds of sentient (or experiential) imperatives refuse the suffocating demands of data-as-data, assumed to be "truth" (i.e., scientific). Data regimes, however, remain hegemonic; they cannot be easily tamed as Norman Denzin (2006) hopefully insisted, but their commodifying and stultifying effects can be challenged, as can the orthodox argument that the data or numbers speak for themselves. Data is always subject to the triple frameworks of generation, codification, and interpretation. My own approach, which does sometimes include statistical methods, however, is to draw on dreaded data to make humanistic arguments for policy and planning purposes.

My own particular use of autoethnography is more analytical (triangulated, verifiable) than evocative—literary, highly personalised, self-referential—(see Rambo, 2005). To these dimensions, sometimes, I add the element of satire. Satire is a literary genre that confronts the absurd with its own absurdity. Satire gets into the contradictions, the cracks, and the foolishness that we all experience, but which conventional science simply brackets out of analysis. Analysis, as the textbooks tell us, must be clean, coherent, and objective. The lived is none of these, however. One of the key sources in my autoethnographic satirical writing about the educational institution is *Malice in Blunderland* (Martin, 1973). Here, Thomas L. Martin discussed the multiplicity of "laws" composed by chief executive officers, deans, and other managers when attempting to understand paradoxes. *Kludgemanship*, for example, is the study of glitches. Murphy's laws about why things go wrong are located here. *Hierarchology* reveals how bureaucracy permeates every aspect of our lives. *The Peter Principle* reveals that managers rise to their maximum level of incompetence, usually resting where they can do the least damage to their employing institutions. *Fuglemanship* is the art of science and leadership, a term for (mis)management. Machiavelli is this category's preeminent personality. As the founder of modern political science he was known for his cunning and duplicity, traits that identify politicians (and many university deans and administrators) everywhere. Lastly, is *academocracy*, the study of the educational bureaucracy. Managerialism is a response to demands for public accountability and administrative justice—we all need to convince Authority that we are all doing our jobs efficiently with equitable workload distributions and regular research outputs. In the edu-factory created by managerialism, productivity triumphs over creativity.

Martin's book was written at a simpler, earlier time when the academy was engaged in education, rather than now when it has become a Fordist conveyor belt run by and for spreadsheet economies audited by bookkeepers and overpaid remote executive officers who know "the cost of everything

but the value of nothing.” This quote comes from Oscar Wilde’s *Lady Windermere’s Fan* (1893/1995, p. 32):

Cecil Graham: What is a cynic?

Lord Darlington: A man who knows the price of everything, and the value of nothing.

Cecil Graham: And a sentimentalist, my dear Darlington, is a man who sees an absurd value in everything and doesn’t know the market price of any single thing.

Are we sentimentalists in an ocean full of cynics? I guess so, but the constraint of paying bills turns everyone into a cynic.

Much of my recent magazine and academic writing deals with the irrationalities of institutions (academic or otherwise).¹ Hacking through academentia is an objective of this often cynical but always entertaining engagement. Where the meaning of academocracy is self-evident (Martin, 1973, p. 113), *academentia* could signify collective academic psychosis as the academic enterprise has shifted its primary role from facilitating social change, to primarily that of a massive institutional data-gathering exercise. The autocratic managerialism that has recently replaced faculty-led democracy in many South African universities (and which is common cause in the USA), is a symptom of this condition.

While there is always a need for administrative systems to work with personnel, plant, and data, the mindlessness of data generation for its own sake has now taken on lives of its own in many academic sectors. Academics are increasingly feeling that they function merely as units of data, mere cogs on a conveyor belt going nowhere. Quality suffers as innovation, originality, and sentient pedagogies are suppressed by hierarchical policies and practices that inappropriately impose positivist and biomedical ethical clearance procedures on the humanities and social sciences that deify gatekeepers as the gods-of-entry to doing field research. Ethics committees sometimes refuse investigative research, punish students and supervisors who show initiative, and protect academic institutions, often at the expense of the student, the researched, and civil society (see Tomaselli & Dyll-Myklebust, 2015). Overlaid on this internal surveillance, while working in conjunction with the envisaged, but yet to be implemented, Protection of State Information Act and other censoring bills like the Film and Publications Board Draft Online Regulation Policy, are the suffocating intellectual property rights regimes that valorise public, community, or traditional information, again often at the expense of its historical custodians.

Banking education (Freire, 1993) under such regimes of internal surveillance, measurement, target planning, and cost-effectiveness, results in students coming to class simply to sign a register and learning merely how to write an exam. Cynically, they have learned to play the system, not necessarily learning anything of significance from engaging with it. The idea of changing the world horrifies most of them, especially those studying commerce. These students do see themselves as cogs in a machine, intending to bank the proceeds. The commodification of research since the late 1980s, encouraged, if unintendedly, by the Department of Higher Education and Training (DoHET) publication incentive scheme, further persuades academics to conduct themselves like factory

¹ See The UKZN Griot (<http://ccms.ukzn.ac.za/publications/ukzn-griot.aspx>) for an elaboration of my satirical autoethnographic method.

technicians—many publish to milk the subsidy rather than to impact their disciplines or to bring about positive social change.²

While conveyor-belt publishing encouraged by the DoHET incentive is by now a well-known phenomenon (see, e.g., Thomas & De Bruin, 2015), the same cynical authors who directly benefit from the scheme ironically might point fingers at the excessive profits reaped by multinationals like Elsevier. Rarely do these opportunistic critics see the link between themselves, the commodification of research via DoHET, their complicity in this chain, and the commercial-academic publishing industry.

What of those of us who still strive for the kind of innovation that is punished by our peers as not DoHET or positivistically compliant? These are the contradictions that the *Journal of Educational Research for Social Change* also has to navigate because it is not yet officially “accredited.” That the journal has survived this exclusion, and that South African authors are publishing in it with no expectation of earning for their universities (and themselves, in many cases) a publication incentive, bears testimony to its relevance.

Below, are some other more elaborated examples illustrating this contradiction.

Who Decides Who Owns Knowledge?

The central commodifying thrust of research is largely sourced, argued Norman Denzin (2013), to the effect of positivism, including postpositivism. Postpositivism offers a critique of positivism and is largely conjectural, questioning Karl Popper’s (1934/1992) idea of falsification. Neoliberal management imperatives that continue to draw on positivist assumptions require that public universities become fiscally accountable, that increasingly they must become self-sufficient. In achieving such goals, all data is to be copyrighted and subjected to intellectual property regimes for expropriation, protection, and commercial exploitation. In one case that I successfully contested, this even included folklore and age-old indigenous stories and knowledge passed down from generation to generation (Tomaselli, 2014). In the instant that such stories are written down, the storyteller loses his or her right to retelling the story in the public commons. Is it any wonder that our Kalahari research participants claim the theft of their knowledge by academics, whether or not their proposals were ethically approved. What is ethical for an institution is often seen to be unethical (if legal) by our research hosts.

Now, I turn to two examples on how instrumentalism impacts social change education, research, and innovation.

Who Decides What Knowledge Is Legitimate?

A few years ago, a book that had been already published by a prestigious European academic press was considered by UNISA Press for a South African printing. Notwithstanding the Dutch publisher’s four affirmative evaluations —following a manuscript revision—UNISA Press commissioned another three reviewers of a text that largely applied autoethnography and self-reflexivity and which elaborated the idea of lived research that effectively interfaced indigenous communities with action researchers, development agencies, and other support institutions. Two of the three latter reviewers were utterly disparaging, one suggesting that the edited anthology would be good for the *Cape Argus* tourism section. The South African edition never saw the light of day, though I and my coauthors have now lectured on the book internationally, and it was the only reference cited in a recent South

² This is the impression that I have formed while editing two peer-reviewed journals, and serving on various publishers’ advisory committees.

African tourism policy document. Further, it is being used by a poverty-alleviation, public–private tourism venture in evolving community–lodge partnership models across South Africa (see Tomaselli, 2012a).

Two of the reviewers implicitly insisted that academics must write in an approved academic code to a restricted readership. The assumptions here are: 1) the fewer the readers, the greater the intellectual value; 2) the form of writing is more important than is the social and development impact of the work; and 3) new approaches that break with orthodoxy—whether positivist or postpositivist—(even if they have the support of the research participants) should be absolutely discouraged.

In trying to make sense of this experience, UNISA Press and its Senate Publication Commissioning committees, however, then realised the high symbolic value of all those unconventional, largely autoethnographic manuscripts that were accumulating on its shelves. These were penned by luminaries like Ari Sitas (2014), someone designated by the Minister of Higher Education and Training as a champion for the Humanities and Social Science Charter,³ and Vetkat Regopstaan Kruiper (2014), the late Kalahari artist who with his wife, Belinda and other members of the †Khomani in the Northern Cape, have advised many cohorts of academic researchers from across the world. The much vaunted official paradigm of indigenous knowledge systems (IKS) floats between these two symbolic poles, yet scientific convention continues to insist on Comptean-derived approaches and contemporary grand narratives (theories, whether positivist or not) as the only legitimate codes and genres of scientific explanation. In contrast, the †Khomani claim that *they* are the professors and that *we*—the clueless academics—are *their* students. Why else would we be consulting them? For them, research anticipates social change, whether positive or negative. They do not see themselves as discrete objects in such research but as active, participating in what they assume will be a socially beneficial exercise for them.

Notwithstanding the rejection of the manuscript, I was consequently employed by UNISA Press along with Alan Weinberg, a luminary (A-rated National Research Foundation scholar) in early English literature and literary criticism, to kick-start what its commissioning editor named the Flame Series. Reward sometimes indeed comes from failure. The series was launched during the March 2015 UNISA Research and Innovation Week, “Transformation in Higher Education: It’s Not Just a South African Problem.” The books that launched the series were written by an academic, poet, sociologist, musician, actor, labour activist (Sitas, 2014), a development consultant (Soni, 2014), and Kalahari artist, Vetkat Kruiper (2014) and his wife, Belinda, who is an organic intellectual in her own right (Kruiper, 2004; Tomaselli, 2006). Each arose out of totally different circumstances, class and ethnic determinations, cultural and social experiences, and places, though each independently met the series’ criteria of developing new expressive pathways, new ways of making sense, involving new kinds of interactive explanation. These works exemplify original, creative, and analytical materials, transcending conventional boundaries and categories. Each is self-reflexive, each revealing something about self–other relations, each offering primary material, analysis, and poesis. Further, each develops different forms of address.

Two of the four Flame Series authors have interacted with me over long periods. I learned much, in my younger days, from Ari Sitas’ unforgiving critique of structuralism, indeed, his rejection of my own

³ See

<http://www.dhet.gov.za/Humanities%20and%20Social%20Sciences/Report%20on%20the%20Charter%20for%20Humanities%20and%20Social%20Sciences.pdf>

early materialist semiotic-based cultural studies paradigm, while I took confidence in Vetkat and Belinda's affirmation of it, even as I was edging towards Sitas' own highly textured culturalist-humanist position (see e.g., Sitas, 1986). At the book launch, Sitas performed his book—poetry, music, sketches, involving a variety of international characters who had become intrinsic to his own voyage of discovery as he encountered so many fascinating others, dramatically narrated through a reconstruction of the lens developed by a well-known early English writer, Jules Verne. Belinda Kruiper, in discussing her late husband's sacred art, reminded the degreed delegates that cultural and social knowledge comes from experiential interactions with ordinary folks who have to manage the often destabilising effects left by researchers, journalists, film makers, and development agents long after they have gone.

Evocative autoethnographers (Anderson, 2006) such as those who presented that evening do not necessarily document the negotiation of research relations with participants, nor add a theoretical line of thinking. Their goal, rather, is to provide a captivating description of subjective experiences in order to create an emotional resonance with the reader (or audience). This autoethnographic subgenre thus requires considerable narrative and expressive skills, typified in well-crafted first person writing in the form of prose, poetry, and performance, and in handwriting, sketches, and painting (see Ellis, 2004; Holman Jones, 2005). In short, they aim to change the world by writing from the heart (Pelias, 2004), a comment often echoed by Belinda Kruiper when interacting with students. The objective thus is to: 1) lead the reader to be emotionally moved and to a sympathetic understanding of a certain event or social cause and 2) encourage the reader to commit to a certain line of action—as is demonstrated in some forms of autoethnographic participatory action research (Anderson, 2006). In our IKS project, our objective is to enable participatory research that includes our informants as cocreators and copublishers of knowledge—and to thereby animate livelihood opportunities for them where this is possible (see, e.g., Kruiper, 2014; Lange et al., 2014; Lange, Jansen, Fisher, Tomaselli, & Morris, 2013).

Evocative texts often include performativity as an epistemological procedure. Performance ethnography and performative writing show emotion and “create texts that unfold in the intersubjective space of individual and community and that embrace tactics for both *knowing* and *showing* [emphasis added]” (Holman Jones, 2005, p. 767; also see Jackson, 1998; Tomaselli, Dyll-Myklebust, & van Grootheest, 2013). Performativity refers to how, “through our writing and our talk, we enact the worlds we study. They instruct our readers about this world and how we see it” (Denzin, 2006, p. 422).

The Flame Series initiative also partly arises out of the 1990s when I was a member of the National Research Foundation's (NRF's) “Unlocking the Future” Focus Area panel. Chaired by a geologist, we multidisciplinary members had little idea of what we were doing even as South Africa was unlocking itself from apartheid. We came up with criteria to encourage best-practice research into the unknown, the different, and the previously precluded. Most grants were secured by hard scientists. The work done was not, however, in vain because a current NRF competitive grant is called Blue Skies.⁴ The NRF description uses terms like *novel*, willingness to take *calculated investment risks* and *curiosity-driven*. The objectives of the perhaps ironically named “Blue Skies Funding Instrument [emphasis added]” are to:

- provide space and time for research to push the frontiers of knowledge and to encourage imagination through scientific and scholarly endeavours;
- support and sustain communities of critical and free thinkers;

⁴ <http://www.nrf.ac.za/sites/default/files/documents/Blue%20Skies%202013.pdf>

- promote and encourage diversity in research for reimagining disciplines or academies;
- bring about new and unpredictable scientific / technological / scholarly discoveries / interpretations / understandings / knowledges.

Having participated in a Blue Skies evaluation panel in 2014, I took heart that my copanellists shared my position about the need for academics to take conceptual and methodological risks, to challenge received assumptions, and to explore new theoretical dimensions. Successful humanities and social science applicants—who had fundamental social and paradigm change on their minds—were much more visible in this later initiative. The conventionally written proposals applying tried and tested methods got short shrift, while the risk takers were rewarded.

The only certainty that remains in the digital age is the certainty of uncertainty and that of instantaneous multidimensional hypermediated change—even as positivist managerialism shapes the way that this change is administered in the many massed, mega universities now dominating the South African edu-scape. Yet, most methodology modules retain the same old dead positivist data. The new series of methods handbooks issued by Taylor & Francis, Blackwell, Sage and so on, that do revitalise older methods and that do explore new methodological territories (e.g., Denzin, Lincoln, & Smith, 2008; Holman Jones, Adams, & Ellis, 2013), are rejected by DoHET for accreditation purposes. In the face of imaginative rethinking indicated in these growing numbers of groundbreaking handbooks, administrators and some of our peers cling to positivism even as old absolutes are disappearing. Selection categories remain path dependent.

My second example relates to *Engraved Landscape* (Lange et al., 2013) that I coedited with colleagues from the Universities of Cape Town (UCT), Pretoria (UP) and the McGregor Museum. UKZN declined to recommend it for the DoHET publication incentive, despite the fact that chapters were written by academics (along with comments and interviews with our †Khomani coresearchers).

The UKZN assessment, in contrast to the other two globally ranked universities, reacted negatively to “a popular slant” that could not “be equated with a book from a scholarly press.” Notwithstanding previous books from this small press being approved by UP and UCT, or in light of an upcoming review in *The South African Journal of Science*, an appeal for publication subsidy accreditation was disallowed. My (unsuccessful) argument was that form (i.e., design, genre, style, appearance) should not be confused with content. Part of the IKS paradigm is to present complicated scientific methods and theory in ways that can be appreciated alike by both specialist and nonspecialist readers, practitioners, and research cohorts (again, in this case, the †Khomani). Like with the Flame Series, the captivating design of *Engraved Landscape* animates its content and enhances the book's readability. Design does not vitiate its (post-structuralist) “science”—however defined (see Pretorius, in press).

The accessibility of the science (a participatory approach) is enhanced through design (which itself can be also conventionally considered a science). Additionally, our method is unique and cannot be negatively declared popular simply because we have applied theories of readability to the book's design, or because it departs from conventional scientific approaches. If IKS is to be acknowledged as a bona fide academic activity, then this kind of presentation must be also taken seriously as an innovative bona fide research exercise—even if it is deemed by positivistic or even postpositivistic criteria to have failed. The inclusion of Afrikaans and Nama are the research statements of our †Khomani informants who were methodologically integrated as coresearchers, as is common in works drawing on critical indigenous methodologies (see Denzin, Lincoln, & Smith, 2008).

Form as a kind of performativity is crystallised in *Engraved Landscape* and the Flame Series in multimedia formats which offer dramatic narratives, performative poetics, personal histories, and diarised analyses. While this kind of approach is not always useful or necessary, my argument is that it should be at least acknowledged as a kind of post-data post-structural genus.

IKS and Performative Rhetoric: I Hear Your Criticisms

Now, while I am keenly aware that performative rhetoric can beguilingly wrap essentialist belief in the impression of scientific or other kinds of logic, we do need to open spaces for a dialogue between contending ontological positions. In South Africa, IKS is presented both as ideology and as practical poverty-alleviation strategy.⁵ Either way, IKS aims to restore local specificity in the face of universalising and standardising or censoring knowledge across the world. A key claim is that many consider cultural alienation to have contributed to poverty, famine, disease, inequitable distribution of resources, and to a natural order deficit that has separated previously self-sustainable communities from the environment that previously supported them. The question, for this approach, is how to restore legitimacy, recognition, and respect in recovering self-responsibly, self-agency, and initiative with reference to what had worked in precolonial times and leveraging this repressed experience for the future (see United Nations University for Peace, 2015).

A problem with IKS is that much of it is rhetorical, performative, exhortatory, and mystificatory; as performed at African renaissance conferences it is call-and-response oratory at its best. Essentialising IKS discourses hail the academy with a mixture of rhetorical proofs and claims to the individuated self-referential, immediate interpretant of feeling (the central idea, the idea to which the sign gives rise) that can be generalised as communally referenced—embodied solely in the incarnate self, then extended to us, people who think, speak and who look like me, legitimised in the exclusionary discourses of “African values,” *ubuntu* [communitarianism], and African tradition (see Blankenberg, 1999). In Charles Sanders Peirce’s (1931–1935) terms, the final immediate interpretant (that which the community of scholars will agree is the common opinion) is reached through largely emotional appeals about the repressive hegemony of IKS’s alter ego, Eurocentricism and the need for its total displacement. IKS discourse is of course itself discursively constructed; it does not exist in and of itself.

It may be argued that IKS requires different systems of verification, but remaining issues are: 1) how to validate the “results” emanating from IKS and share them for the greater good, especially where traditional medicine is concerned; and as William Ellis (2014) argued, 2) how does the researcher valorise the evidence of experience in a nonessentialist manner? (see Berry & Clair, 2011); and most crucially, 3) how does one deal with a self-referential prelapsarian-type discourse (Eden before the Fall; *ubuntu*) that exists entirely within its own authority—one that assumes a priori “purity,” which does not permit critique and which cannot be faulted because of its claimed indigenous status. A reckless indigenisation of theory that ignores critique, often results in ethnically or ideologically exclusive discourses that hail genocide, no matter the society, mode of production, or educational level (see Tomaselli, 2012b, p. 30⁶). Given the salutary experiences of Nazism and apartheid, this is one key reason why Western scholars are suspicious of schemas that suppress critique, dialectical reasoning, and debate and that fail to disaggregate between belief and behaviour.

⁵ This was the clear message from most of the papers presented at the “Indigenous Knowledge Systems and Environmental Ethics: Implications for Peace-Building and Sustainable Development” conference held at the University of KwaZulu-Natal 28–30 April, 2015. Partners included University of Rwanda, University for Peace, National Research Foundation, and the South African Department of Science and Technology.

⁶ My thanks to William Ellis for this last particular insight: Lecture, 29 June 2011, cited from Tomaselli (2014). Also see Ellis (2014).

The difference between autoethnography and IKS is helped by Anderson's (2006) distinction between *analytical* and *evocative*. The former examines and leverages—in my and my Durban colleagues' own approach—the relationship between self and other to devise new interactive encounters and ways of doing, theoretically knowing and writing; the dynamical interpretant in Peirce's terms. This analytical approach to autoethnography lends itself to a degree to triangulation and verification, if not abstraction.

Evocative autoethnography, equally an ethical practice, pursues a different kind of immediate interpretant, though largely self-referential, methodically excavating layers of meaning embedded in lived conditions and experiences of the individual storyteller, that are not generalisable and that do not problematise the researcher–researched relationship. Neither autoethnographic approach exists within its own authority. In contrast to IKS, autoethnography demands critique, by both the self and the other, and makes no claims to representing groups, classes, nations, or continents. It does not exclude anyone who is not like the autoethnographer.

Where rhetorical forms of IKS are basically a quality of feeling, existing within its own discursive authority, it is constructed as speaking for everyone claiming indigeneity. The question is how can IKS be absorbed into the academy as other ways of knowing? A new imaginery is required for this task.

A New Imaginery

The post-Cold War Western neoliberal conjuncture has reshaped academia as a new site for commodity relations. This is what I mean by academentia framed by data and hierarchology alone. Properly done, postmodernism offers a critique of modernism. However, to be socially relevant, postmodernism (indeed, all paradigms) need to recover position, rights and justice. Educational institutions must recover critique, the hegemony of data and numerical methods needs to be ruptured and rethought, and universities should enable unruly pedagogies. A new unruly paradigm would be relevant, proactive, and acquisitive. This imaginary would:

- Be all-inclusive, democratising, useful, generating employable (critical) graduates. It will return authority (with a small *a*) to the citizenry (the aca-democracy) rather than reside solely in textuality, authority bureaucracy, hierarchology, or fulemanship.
- Engage with critical and indigenous methodologies and invest analysis with new, diverse, pluralistic, ways of doing and making sense.

Critically examine commodification of the educational enterprise, and question power relations, as a means of equipping graduates with expertise to successfully manoeuvre within institutions for career purposes, while also to help ethically orient them in the context of social change imperatives. This practice would take into account the plurality of ontologies and identities that now jostle for legitimation and power in a postmodern pluralistic world where an antidiversity trend has nevertheless begun to emerge.

As I argued with regard to the Academy of Science for South Africa (ASSAf) Panel on the Future of the Humanities (see Consensus Panel, 2011) on which I served, what is to be protected is not Eurocentricism or Afrocentricism nor abstract notions of civilisation and hegemony of the canonical text (often argued to be the repository of civilisation, or social theory that claims universal application). Rather, the new imaginary requires that instead of defending paradigm fundamentalism and Western civilisation (and its philosophy made possible by the Enlightenment), that we rather critically engage this corpus and build a more inclusive polysemic dynamic humanities that responds

to the myriad contexts in which the diversity of multicultural generations now find themselves. Looking ahead, Denzin (2013) asked us to:

Imagine a world without data, a world without method, a world not run by auditors and postpositivists. A world where no one counts data and data no longer count. Imagine a world where research is no longer a dirty word (Smith, 2012, p. 1), a world without coding schemes, a world without computer software programs to analyze qualitative data, a world where utopian dreams are paramount, and we all work for new politics of possibility (Madison, 2010). Just imagine. (p. 354)

Social change is often used as a slogan for more of the same. That same is underpinned by the ideology of data (equated to truth) when it works in the service of repressive hegemonic interests. However, does positivism really make us demented though it might be blinding? In many ways, the processes of data gathering do separate subject from object, alienating the experiential (fly in the soup) from the observed (fly on the wall). That's why so many development projects fail; the supposed beneficiaries and their interpretants are ignored or discredited in the process.

While I don't share the call for the death of data, the ways in which data are used are often antidemocratic, but I do conclude that we need to study data as manifestations of ideology. While meanings are indeed always in motion, some meanings have to be prevented from resulting in genocide. The data reveals ever more starkly about inequality across the world but this is largely meaningless unless one has actually experienced poverty, dependency and helplessness, and resistance in a sustained way. It is from the experience, the auto, that solutions can be best found.

That's why autoethnography can open doors to different ways of making sense. Where IKS seems to draw on an imagined and generalised cultural, almost Jungian unconscious, autoethnography is a practice, a way of bringing issues, memories, and experiences to the surface—in the search for explanations and solutions.

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Reflections of a Novice Academic Writer

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Abstract

This article is a narrative account of my experiences as an emerging writer engaged in the process of writing an article for submission to an academic journal. As a novice academic writer, I was supported by my doctoral supervisor and another senior lecturer who has published several articles. I draw on this first experience of writing an article to disseminate findings of research done at undergraduate level as material for this article. The reflective journal written when I was an undergraduate student, the drafts of the article, as well as my supervisor's comments were used as data, which I analysed. Mezirow's (1991) transformative learning theory with the categories of challenges, learning, and emotions was used as a theoretical lens for analysis. The findings point to the process of scholarly writing, the challenges that I faced, the academic learning I experienced, as well as the emotional development on my journey towards becoming a scholarly writer. I conclude that deep reflection on the process and the action of writing enhanced my own development as scholar. This has implications for other novice writers who are forging their way in academia.

Keywords: Academic writing, narrative, reflection, Mezirow

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Introduction

How does a novice academic writer learn to write a scholarly article? This is a question confronting many emerging scholars who want to establish themselves as academics. I am a teacher, a novice writer, and an emerging researcher who wants to immerse myself in research and publication and in so doing establish myself in academia. As a third-year undergraduate student teacher several years ago, I conducted research on teenage pregnancy as part of a research and service learning module in the Faculty of Education,⁷ University of KwaZulu-Natal. In this module, we were expected to research the service learning projects that we conducted in various communities. I was engaged in a service learning project with pregnant teenage schoolchildren at a rural high school. I thought the project warranted writing an article to disseminate the findings. It was during this process, as well, that I was exploring what is expected when writing a research article. Because the article writing process was new to me, I made notes reflecting on my experiences of writing the article. These reflections provided the impetus for writing an article about learning to write an article in collaboration with my supervisor—contributing to the body of knowledge of writing for publication. I am the participant in this research.⁸

As an aspiring academic, the notion of “publish or perish” is at the fore of my mind. They are powerful words because they describe the expectation that academics should conduct and disseminate research, alongside teaching and community engagement. Publishing research is essential to an academic career—for recognition in the academic field, in my case, education. In the absence of such publications, one’s academic standing and consequently, prospects for promotion, applications for grants, and National Research Foundation rating is impacted. Being an academic at a university clearly requires research and the production of new knowledge that is useful to society. Neem (2014, para. 2) wrote that a university is the “critical conscience of a democratic society. It houses experts in various spheres of life who must use their knowledge to enhance the public’s understanding of vital issues.” It is evident that knowledge production is critical to all higher education institutions in South Africa. It is for this reason that in the *National Development Plan: Vision for 2030* it is stated that, “Higher education is the major driver of the information/knowledge system, linking it with economic development. However, higher education is much more than a simple instrument of economic development. Education is important for good citizenship and enriching and diversifying life” (National Planning Commission, 2011, p. 262). According to Mouton (2010, pg. 8), in South Africa “knowledge output (as measured in terms of article production) may have reached a plateau at around 7 500 article equivalents per year (which constitutes about 0.4% of total world science production).” The current ranking of universities as research-focused institutions places an added expectation on academics to increase the number of publications, and for these to be published in high profile accredited journals.

Nationally and internationally, there has been an increase in published journal articles by postgraduate students coauthored with their supervisors (Nethsinghe & Southcott, 2015; Nyika, 2015). Postgraduate students are encouraged to publish in scholarly journals in order to disseminate

⁷ The Faculty of Education is currently called the School of Education.

⁸ The second author is my supervisor of the project and the third author has published many articles, both people supported the writing of this article.

their research—during, as well as after completion of the study—as an introduction into publishing and the academic community. The requirement in many South African universities is for postgraduate students to provide evidence of submission of an article to an accredited peer-reviewed journal when submitting a doctoral thesis for examination. The student who is a novice writer of articles is to be supported by her or his supervisor who often serves as coauthor of the article. The coauthoring approach to writing is beneficial because both student and supervisor “benefit by internalising each other’s cognitive processes, arrived at by communicating socially” (Dale, 1996, p. 65). This “apprenticeship learning perspective sheds light on how the process of getting published is a way of gaining access and entering into the academic community. This is a process of both learning the craft and developing researcher identity” (Wegener & Tanggaard, 2013, para. 43).

Shah, Shah, and Pietroban (2009) confirmed the view that writing a scholarly article is a daunting task for many novice researchers, because they experience difficulties with “distinguishing between content and structure, and backward design of manuscript” (p. 511). Further difficulties are experienced in the writing of an article according to a particular format, deciding on the appropriate content, the choice of words, and the time needed for writing and consulting with a mentor. Novice researchers therefore need to acquire knowledge and skills of how to write a scholarly article, and to then use them to develop an article that could be accepted upon peer review. The reporting on one’s research, structuring and designing the manuscript, and producing the final copy is enhanced by the input of experienced scholars.

At the outset of writing for publication, excitement is experienced. However, the enthusiasm to write for publication may be rudely halted when the novice researcher begins the writing process and encounters challenges. The focus of this article is, therefore, on a novice researcher’s learning to write for publication. The following critical questions are asked:

How did I as novice writer, with the support of supervisors, experience learning to write an article?
How did this experience affect my development as a scholarly writer?

Scholarly Writing

In this section of the article, I position my work as a novice academic writer in the body of knowledge on writing for publication. The notion of publish or perish, which “is actually an implicit or explicit requirement” (Derntl, 2014, p. 107), is one that haunts many academics (and novice researchers) as to the outcome they could expect should they not be successful in publishing scholarly articles. This may have a negative effect on academic work because “the growing competition and ‘publish or perish’ culture in academia might conflict with the objectivity and integrity of research, because it forces [researchers] to produce ‘publishable’ results at all costs” (Fanelli, 2010, p. 1). The novice researcher could experience this as positive pressure to add to the research field. This pressure, however, could have a negative effect if the novice researcher has an unsettling and even painful experience of the writing process.

The word *novice* is used to refer to “someone who is just beginning to learn a skill or subject” (“novice,” n. d.), in this instance, a beginning researcher such as a graduate student who, according to Leedy and Ormrod (2005), is challenged by the intricacies of the diverse aspects of research and also writing up the research. Novice researchers are thus in the process of developing both the knowledge and skills of research and writing for publication, which includes academic writing. These are best developed when working with a mentor who supports the novice in her or his induction into the practice of scholarly writing.

The knowledge and skill required by the novice writer is to turn the research into a manuscript of an appropriate scholarly standard. However, novice writers experience “academic writing as inherently difficult” (Blicblau, 2011, p. 215) because there are so many aspects of writing that need to be considered simultaneously: the structure of the research article; guarding against plagiarising; and accessing, interpreting, and integrating previous research that has been done in the field. In the context of South Africa, the difficulty of writing is intensified by having to describe and explain your research in a language that is not necessarily your mother tongue. These difficulties are experienced by many postgraduate students (Wegener & Tanggaard, 2013). Nash (2004) and Mackenzie and Knipe (2006) also referred to the difficulty of making a choice to write in the third person when reporting on quantitative research, or using the first person when reporting on qualitative research.

According to Jalilifar (2010), the key to a good publication lies in the title because it is “the proof of identity of any academic piece of work without which it would find no space in the intended discourse community” (p. 30). The formulation of a clear title can add to the woes of the novice writer; Jalilifar (2010) suggest that its formulation should be seen as a process where the writer includes three aspects: the what (focus of the research), the who (people researched), and the where (site of the research). Landrum (2007), though, interestingly pointed out that experienced writers do not necessarily follow the rules of writing, including the structuring of their titles.

A seemingly simple way to learn how to structure an article and improve writing is to study the format and writing style of different publications (Cho, Schunn, & Kwon, 2007). The structure of a research article is inclusive of a literature review. A diverse set of skills are expected when constructing a literature review: read, interpret and cite other researchers’ work in the field, and present it in a coherent and integrated way. Doing a literature review or drawing on relevant literature presents a challenge for novice researchers in terms of plagiarism. Plagiarism, according to Pecorari (2008), is “recognised in academia as ‘common,’ as a ubiquitous practice not only of international students, but of all students at university campuses” (p. 325). Many students struggle to develop the skill to paraphrase or cite accurately, and resort to copying material directly from the original source. Although there are programmes such as Turnitin and iThenticate that use text matching software that pulls up the original sources of matching text, the programmes cannot detect plagiarism where the writer has paraphrased and not cited the author. Learning how to ensure that “the words used [are] one's own and . . . properly acknowledged with the original source” (Chowhan, Nandyala, Patnayak, & Phaneendra, 2013, para. 5), is a skill that must be acquired.

Accessing relevant and recent publications and interpreting the research findings reported in them are further skills that novice writers are expected to develop. Initially, the writer may be confused and uncertain about how to access a journal but for a registered university student, support is available. The action of consulting with librarians and accessing the internet facilities provides good guidelines on how to access journal articles. However, it is essential that the writer understands that a journal article is a dated record of an author’s research questions, methods, findings, and conclusion (Shotton, 2012). The process of sifting through the articles to extract the relevant information requires skill and practice, the development of which is enhanced by increased practice. Besides the skill of writing, there are also social dynamics to be considered: ability to work cooperatively and collaborate with a supervisor, and the personal attitude of the writer.

Writing an article may be a solitary or collaborative process. Working cooperatively and collaboratively with a supervisor is a necessary action, which should be beneficial for both individuals. However, this is not always the case because learning a style of writing from a supervisor may disrupt the novice writer’s own flow of ideas, and this could frustrate and impede progress. Hence, the “role of mentors in guiding, encouraging, and supporting novice researchers” (Shah et al.,

2009, p. 514) is an essential aspect to be considered when negotiating this relationship from the outset. While this relationship is viewed by some as hierarchical, this is challenged by other researchers (Colbran, 2004). The essential point to consider is that writing is a fundamental skill that all research students need to develop (Colbran, 2004) and, considering the messiness of writing (Cole & Knowles, 2001), novice writers require support from mentors. This can be in the “form of encouragement” (Shah et al., 2009, p. 514) and may include the evaluation of the soundness of the written piece and its use by other authors (Shah et al., 2009). Furthermore, the support should focus on the advice that clear communication of research is of utmost importance and “those who reported research must attend to the soundness of the subject matter, the nature of the intended audience, and to questions of clarity, style, structure, precision, and accuracy” (Shah et al., 2009, p. 511).

For a novice writer, having one’s work judged (reviewed) by experienced scholars in the field instills fear and anxiety. The fear is that the information researched and reported on may not be accepted as contributing to new knowledge in that particular field and that the reviewer may not find the article acceptable for publication. Also, if the article is accepted, the novice writer experiences anxiety due to further scrutiny by readers who, most likely, comprise of other experts in the field and this “audience does not read to be entertained, informed, or persuaded; the audience reads to evaluate” (Landrum, 2007, p. 2). So, the thought of being evaluated by peers can be a daunting one for a novice writer.

Healey (2005) described the research experiences of novice writers as students becoming active participants in research: “It is suggested that undergraduate students are likely to gain most benefit from research in terms of depth of learning and understanding when they are involved actively, particularly through various forms of inquiry-based learning” (p. 183). Likewise, the novice writer is likely to gain most benefit from the act of writing. The novice writer moves from being an active participant in her or his own research to producing a narrative account of the research. During this process, the writer’s learning about writing is being transformed.

Theoretical Framework: Transformative Learning

Transformative learning theory as described by Cranton (2002) and Mezirow (1997) was used to make meaning of my own experiences, my reflective writing, and the comments of my supervisors on my article. Mezirow (1997) viewed transformative learning as a change process that transforms a person’s frame of reference. His theory defines frames of reference as “the structures of assumptions through which we understand our experiences. They selectively shape and delimit expectations, perceptions, cognition, and feelings” (1997, p. 5). The process of writing, getting critique, rewriting, and emotional upheavals leads to greater transparency of the writing process, thereby leading to the change required (Cranton, 2002; Mezirow 1991). The mechanisms for transformational learning include experience, critical reflection, and rational discourse. The starting point for this learning is a person’s experience, the critical reflection on one’s experience (the vehicle by which one questions the validity of one’s worldview), and the rational discourse functioning as a catalyst for transformation as it induces the various participants to explore the depth and meaning of their various worldviews (Mezirow, 1991).

In order to use transformational learning as a lens, I needed to elicit and question the concepts of novice writing from a perspective of the challenges, learning, and emotions I experienced. I had to comprehend these, recognise, and expound on them during the writing process. During the process I was, as described by Mezirow (1997), in a transformative learning environment in that I was free from coercion because I had initiated the idea to write the article, and had assumed the various roles

of writer, critical reader, and reflective student who was willing to search for a synthesis of different points of view. However, my previously undisclosed and uncritically held assumptions and beliefs that learning to write is an easy and automatic process, and that I would be able to structure my ideas in a scholarly manner the first time that I wrote them down, were challenged.

Methodology

I had conducted research on teenage pregnancy where the participants were teenage girls and boys, and I decided to use the data to write a journal article. In writing the article, I used an interpretive paradigm to frame the research because I interpreted the data at a particular time and in a particular context. An interpretive paradigm requires qualitative research and therefore the data I collected were mostly descriptive and comprised an in-depth description of my particular experiences (Creswell, 2008). This approach was used to explore my first experience of writing an article for a journal, and what it means to write for publication. My intention was to develop a deep understanding of my experience of learning how to write—as a novice researcher. The research design was a case study because data were collected about one case—my case—as I attempted to gain in-depth understanding about a particular phenomenon (Punch, 2009).

The methods of data generation included writing a reflective journal while in the process of writing the article, writing the drafts of the article, and the supervisor and mentor writing comments on the submitted drafts. The data thus consisted of a reflective journal, the draft articles, and supervisor and mentor's comments and suggestions. The reflective journal served as a means to record my experiences of writing, to keep track of the progress I was making (or not making), and to record my thinking throughout the writing process. The draft articles also showed the progress I was making and were a good way of checking how my writing had transformed from the start to the final product. The supervisor comments showed my progress in developing as a scholarly writer and, also, whether I had learned from previous mistakes. I chose to work with the drafts because I saw them as evidence of my emerging writing.

When analysing the data I used a priori coding, where the categories were established prior to the analysis and based upon theory. The a priori coding involved me making meaning of the data in response to the research questions posed, whereby I fitted the analysis into Mezirow's (1991) theory of transformative learning as an analytic framework. The experiences recorded in my reflective journal provided data with regard to my emotions while experiencing the process of writing. The changes in the different drafts, as well as my supervisors' comments and suggestions, provided evidence of my learning with regard to academic writing. All data sources produced evidence of the challenges I faced and needed to overcome in the process of learning to write in academic style.

Trustworthiness was established by ensuring credibility, dependability, and conformability with the triangulation of the data generation methods: using a reflective journal, draft articles, and supervisor comments and suggestions. Transferability was ensured where a dense description of data, including verbatim direct quotes, are presented (Lincoln & Guba, 1985).

Findings

In this section, I present the findings as analysed using Mezirow's (1991) theory of transformative learning, which serves as a system for interpreting and evaluating the meaning of experience (Cranton, 2002). However, before I discuss the findings, I offer a descriptive narrative of turning my research into a publishable article.

Turning my research into a publishable article.

The undertaking of writing for publication was not as easy as it initially seemed. There were many aspects of academic writing that I had to consider before writing the article. For the undergraduate research study, I had designed an interpretative, mixed methods project to provide a deep analysis of why the birth rate among teenage girls was increasing in the Inchanga area in KwaZulu-Natal. A convenient sample of eight pregnant teenage girls was used and they were asked to complete questionnaires for me to get an overview of the ideas that teenage girls in that area had about pregnancy. This was then triangulated by my second instrument of a semi-structured interview to validate the data from the questionnaire and gain an in-depth understanding of the social factors that contributed to the experience of being pregnant. Since my research design involved both qualitative and quantitative data, triangulation of the data was of utmost importance to make the research reliable, and I needed to carefully justify any conclusion I reached.

I knew I had to locate a journal in which to publish my article. Looking at the notes to contributors of some journals, I realised I needed a journal that focused on publishing research in the area of my study. I chose a journal that seemed best suited to my research because it included similar articles and involved topics that affect education in South Africa. A treatise of approximately 100 pages had to be reduced and presented as a coherent article. Reading carefully through my treatise, I selected what I thought would be relevant and then collated a shorter version of the study in an article format. This I promptly sent off, as e-mail attachment, to my supervisor for her comment. Anticipating a positive response to my first draft of the article from my supervisor, I waited for her e-mail to arrive with the feedback. I was located in Pretoria and she was in Durban, so our exchanges were done mainly electronically, via e-mail. When the e-mail did arrive, I was dismayed and alarmed by the feedback I received. My supervisor had used the Track Changes function, and so the article was filled with red inserts, comments, and questions. She raised aspects that I had not even thought about, and made suggestions of what I needed to do to enhance the scholarly level of the article. While this was helpful, I felt discouraged because I realised that apart from the many mistakes I had let slip through, I had not taken into consideration that 6 years had passed since I had completed my study, and that the literature needed to be updated. This meant that a considerable amount of reading was required to update the literature on the topic. This was time consuming but for publication purposes it had to be done. To update the literature invoked mixed feelings as I realised that the research conducted on this topic was vast, and that most of the previous reading I had done was outdated and no longer applicable. Many hours of reading, rereading, paraphrasing, quoting, and writing brought me to condensed literature that I could use in the article.

I was alarmed when my supervisor inquired about the theoretical framework for the article. “What is that?” was my first reaction. Having completed an honours degree, I was sort of familiar with the term, but I did not have a true understanding of what the concept meant. I also knew about the confusion amongst researchers and students alike around what the constructs *theoretical framework* and *conceptual framework* mean, because we had debated this extensively. Trying to understand, I read more, but found that every article or textbook I read confused me further. It seemed that most researchers decide on a theoretical framework and then analyse their data using their framework as a lens through which to view the data. In this case, I had data but no framework. I felt I was working backwards. At this point, I considered whether writing for publication was worth it. Being ambitious, I persevered and continued searching and reading. After much reading and discussion with my supervisor and other postgraduate students, I decided that a sociocultural framework was the most suitable theoretical framework, and I used it to analyse the data.

When I was satisfied—and impressed—with my second draft, having updated the literature and written about a theoretical framework, I decided to scan the chosen journal again to check the

requirements for submission. My supervisor had advised me to read the notes to contributors in preparation for submission to the journal, but she did not provide detail as what to do with these. I had to work with them myself. Having chosen a journal I wanted to publish in meant that I needed to structure my article according to the stipulations prescribed by the journal. The process of rewriting started again. Academic writing, where sentence construction and flow (even the choice of every word is important), was required and this was clearly daunting to me as a novice writer. I finally sent the second draft of my article to my supervisor.

Anticipating that there would be fewer changes needed to the second draft, I was more at ease waiting for the feedback from my supervisor. Once again, the draft came back with many red inserts and comments, but I could see some progress. She pointed out issues with my referencing, the need to explain certain matters in more detail, and to provide evidence to support the statements I had made. The format of the article had to be altered because the data needed to be presented in a manner that would reflect the findings more clearly and be easier for the reader to understand. I did the required revisions and sent off the third draft to my supervisor.

This time I was sure that the revisions would be few because I had written and rewritten the article so many times, changing and adding, rephrasing, and refining it. When the feedback came, I was rather disappointed to see that there were still further revisions required. The literature review, for example, was still not satisfactory, and it was beginning to frustrate me. I had read so much on the topic yet it still seemed as if it was not enough. I revised the article much faster this time and focused on exactly what the comments asked for. Hoping that my supervisor would be satisfied and that I had managed to improve the scholarlyness sufficiently, I sent the fourth draft to her. I expected that the article would have a few minor errors that could be easily corrected and the article could be submitted to the journal of my choice, ready for review and, hopefully, for publication.

We collaboratively developed the article and after several drafts and much time (I was studying and my supervisor was engaged in many projects and teaching) it was at a point where it could be submitted to a journal. On submission of the article, I realised that this had been a daunting experience and that in spite of my efforts, I had no idea whether my article would be considered favourably by the reviewers. It was at this point that I realised I needed to write about the experience. The article was reviewed but the editor suggested that it should rather be sent to a health sciences journal and not a science education journal. This action is in process.

Using Mezirow's (1991) transformative learning, I offer my findings in the following three themes: challenges, learning, and emotional experiences.

Challenges

While there were several challenges that I experienced during the writing process—making me realise that I was underprepared for academic writing—each of them became an opportunity to learn. The challenges pertained to making a coherent argument, aspects of writing such as the use of scientific terminology, reading, and paraphrasing to avoid plagiarism and referencing—all necessary in writing a coherent argument. Time to work on the article also presented as a challenge.

The main challenge was clearly learning how to present a cohesive argument based on the findings of my research. It is not enough to simply report on what the data presented. I was challenged by the idea that I have to show that my findings answered my research questions. My supervisor advised me to be clear and concise about any claim that I made, and to support each claim with relevant

data. She also time and again said, “re-visit your research questions often to make sure that you are sticking to your study and not going off on a tangent” (Supervisor, comment from draft). This proved difficult because I had to constantly weigh up whether what I was saying was necessary, and I needed to support my argument.

Of course, academic writing requires the writer to use the tools of the trade such as research terminology. Understanding and using appropriate terminology for academic writing was not easy. The knowledge that I had from postgraduate studies clearly was not enough and I still needed to read more on terminology used in research. Clear examples of this were the distinctions between methodology and method, conceptual and theoretical frameworks, different types of learning theories, and the validity or trustworthiness of data. Only if I understood these could I use them appropriately. My supervisor advised me: “We speak of validity in quantitative research but the trustworthiness of qualitative research” (Reflective journal).

The vast area of literature generated by researchers required me to understand what was said, and to paraphrase it in a clear way for use in supporting my writing. Paraphrasing was something I worked very hard on because I did not want any problems with plagiarism at a later stage. Yet again, this was difficult because sometimes I felt that the way it was written by the author was best and that my paraphrasing would not do justice to the point. My supervisor suggested I try to say what I needed to as if I was telling it to someone else, like a story: “You need to find a way to get the words across by using your own words” (Supervisor, comment from draft). This required writing and rewriting until I felt I had the right words in the right place and that the paraphrasing was accurate.

In support of my argument, I drew on and referred to other researchers’ work, which necessitated proper referencing. Every journal, of course, has specific requirements for referencing, as did the one I was writing for. While getting into the APA referencing style was not difficult, it was tedious and made me procrastinate many times. Not referencing meticulously invited comments such as “stick to the same referencing style” and “take note of the use of full stops and commas” from my supervisor. Every time I wrote, I had to ensure that I was adhering to the notes to contributors stipulated by the journal. I was constantly reminded to “check if what you have done is within the journal requirements” (Supervisor, comment from draft).

Besides these challenges, making time to work on the article was limited because I had a full-time job and was simultaneously studying towards a master’s degree. This added to the frustration that I experienced because I wanted to work on it but felt I could not find enough time to do so. “It is important to try and develop some type of routine, so that you find time to work on your article” was a recurring plea from my supervisor. So I set aside time by dedicating an hour before I started the day’s work to focus on the article.

Learning

Each of the mentioned challenges provided opportunities for learning. The knowledge and skills I acquired during the writing process were beneficial in writing the article and also for future work, indeed, contributing to my learning and transformation.

In searching for literature to support my argument I learned to skim read articles, sifting out irrelevant information and finding that which was relevant. This sounds easy but I was worried that I would miss relevant information in the process. I learned to summarise and then sift through the information and extract the relevant data.

As I read and discussed with my supervisor the different terminologies I grappled with, I became more familiar with what they meant and how to use them in the article. I also noticed that as I kept writing and rewriting, the use of terminologies flowed better—as I wrote I was clarifying my thinking and as I was thinking, my writing became more clear: “This paragraph is well written and you have made use of some good research terminology” (Supervisor, comment from draft). One of the most important aspects of learning was understanding the value of a conceptual and a theoretical framework. I remember asking my supervisor, “What is the difference between the two and why do we need this?” After reading many articles and trying to understand the purpose and need for a framework, I was happy to find that it allowed my work to have some logical structure so all aspects of data could link and be presented more meaningfully. It allowed me to learn how to think critically and give responses, avoiding assumptions and personal opinions.

Learning the intricacies of referencing according to APA referencing style was a necessary learning curve—I thought I knew how to reference when I did my undergraduate and honours research modules—because it is a critical tool in ensuring that other authors’ work is properly acknowledged. Each time my drafts came back, I found fewer referencing errors and my supervisor commented that I was referencing and citing my work much better: “Your referencing is improving, keep checking as you work” (Supervisor, comment from draft).

In spite of feeling overwhelmed when the draft—filled with red tracked changes—came back from my supervisor, the use of Track Changes in Microsoft Word opened up another possibility for working with my own students’ work. My supervisor used the function to suggest changes to my work, and comment on how I could correct or change what I had written to be more clear. Working on the document in Microsoft Word also facilitated writing and editing, enabling me to find suitable words or synonyms to improve the sentences.

My ability to summarise, paraphrase, quote, and cite—used in writing my article—has improved and I am able to write in a more coherent, academic style. This was developed by interaction with my supervisor and mentor, the reflections in my journal, and consulting relevant literature. I have learned, through all my reading, how to structure my paragraphs and create a flowing argument. My supervisor often asked me to read through my paragraphs after completing them to “check that it flows” and when she finally, in the last draft, pointed out that “this paragraph flows very well, good!” (Supervisor, comment in draft), I was elated!

A researcher does not make sweeping statements but supports argument with data and literature. This required critical reading and analysing which quotes would be best to use in creating a sound argument or justifying a claim. Soon I found myself wanting to use this in other aspects of my life, which has allowed for personal development as I changed the way in which I communicate—making sure I have a reason for my opinion or view.

Emotional experience.

I have learned to recognise that work (and life) does not come without challenges, and in my enthusiasm to write an article I had anticipated challenges. My reflections, however, brought me to a deeper awareness of what it takes to write a scholarly article, and that I had learned valuable knowledge and skills needed for the process. However, the most important transition I made in my journey of scholarly writing was an emotional one.

Anxiety was the feeling I experienced almost every time I sent a draft for review to my supervisor because I was unsure of the nature of the feedback and the extent of the changes (the work) that might be required. Mezirow's theory points out that in being human our urgent need is to "understand and order the meaning of our experience, to integrate it with what we know to avoid the threat of chaos" (2000, p. 3). Although I expected to feel these emotions, I had no idea how severe the emotions would be. When I received my first draft back from my supervisor, I was devastated and convinced that I would never be able to develop academic writing skills. I put the draft away and tried not to think about my disappointment. Some time passed before I could bring myself to think about the possibility of trying again.

I went into article writing with confidence that I knew exactly what needed to be done, and I was sure that I could complete the task easily and effectively. I remember reassuring my supervisor that I was confident that the article would be "published in no time." This only lasted until I received my first draft back. I felt discouraged and demotivated and realised very quickly that this was not going to be as easy as I'd thought it would be. To help encourage me, my supervisor reassured me that "this is a learning process and you should see every comment as positive criticism to better your article and your writing skills" (Supervisor, comment in draft).

Eventually, I read my supervisor's comments and tried to address each comment—one at a time. This proved to be frustrating because at times I was not sure how to express what I wanted to say in a more academic, clear, concise, and relevant way whilst still managing to reference, have flow throughout the article, and avoid sweeping statements. It seemed like so many things to focus on at once. As I worked through the article, I realised that this process had strengthened me and prepared me for the next round of comments.

This time I was more open to suggestions and changes because I was sure there would be a few because I had addressed all the previous comments. Again the draft came back with many changes and comments; I was becoming annoyed because making the changes was a very time consuming process and required my full attention to focus on all the many things I needed to in order to create an academically strong article. My supervisor advised: "It doesn't help to become angry or upset about the comments. See it as a learning process. You are getting better each time" (Supervisor, comment on draft).

By the time my third draft was returned to me, I was more in control of my emotions. This experience prepared me for the day when my first manuscript submitted to an accredited peer-reviewed journal will be returned to me. I have learned not to succumb to self-pity, and will accept it as a positive learning experience.

Discussion

Looking back at the article writing process, I have found that it ties in with Mezirow's (1991) transformation theory. Mezirow (1991) emphasised the importance of change brought about by experiences. Through my experiences of challenges, learning, and emotional experiences in writing the article, I have grown and developed my academic writing skills. This has brought about change in the way I think about, understand, and interpret information. By receiving what seemed to me a negative response to my writing the first few times, I was able to fully experience challenges, learning, and emotions related to writing an article. My expectation and anticipation of an instant positive reaction was rudely halted, but the comments proved to be beneficial in the transformation of my academic skills development. These challenges, emotions, and learning during the writing process enabled me to construct knowledge that I would not have otherwise gained from my

postgraduate studies. Learning through these experiences has helped shape my understanding of developing as a scholar.

Conclusion

As postgraduate students and teachers, we are expected to be lifelong learners—in this article, learning how to write a scholarly article. In the article, I focused particularly on responses to the research questions posed earlier: How did I as novice writer, with the support of supervisors, experience the coauthoring of an article? How did these experiences affect my development as a scholarly writer? In responding to the questions, I explained the challenges, the learning emerging from the challenges, and how it made me feel. Nash (2004, p. 64) succinctly stated that, “writing is both a craft and an art.” This craft and art, for me, was certainly developed by my reflections on the process itself. It is through reflection that novice writers may be enabled to not only learn the process of writing for publication, but to work through the challenges that confront them as well.

While transformational learning has taken place through this process, the biggest transformation occurred with regard to my emotional development. This was made possible by constant interaction with my supervisor and a more experienced author, and also the actions of writing and reflecting. Emotional maturity enables the writer to be able to respond positively to comments and criticisms. I am of the view that the novice writer should create an environment where such emotional maturity can develop by accepting that every comment or criticism is actually a learning that furthers one’s development.

By sharing my reflections, I enable present and future graduates to take on the challenge of writing for publication, to pen their first articles with the full knowledge that the process is not easy but that eventual success is eminently fulfilling. My experience has paid off because I am now developing the required skills and knowledge. This process is possible under the mentorship of more seasoned writers. Much work needs to be done by higher education institutions to successfully empower novice writers to write for academic publication. This critical narrative of my experience of learning how to write an article under the supervision of a supervisor and mentor contributes to the body of knowledge on writing for publication—an activity that should be an integral part of postgraduate study. For the quality of education to transform and improve in South Africa, educational research is needed so that more informed decisions and actions can be taken. This article could contribute to an increase in educational researchers who publish their work, thereby contributing to a transformation.

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Integrating Reflexivity: Negotiating Researcher Identity Through Autoethnography

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Abstract

This article illuminates how reflexivity and autoethnography can be integrated into scholarly inquiry. As such, this inquiry focuses on the process of negotiating researcher identity through autoethnography. It presents the author's internal struggles throughout a research investigation on the perceived conflict between Western science education standards and Confucian learning traditions that arose as a result of education reform in Taiwan. The researcher's learning and cultural experiences in Taiwan and Canada and their relationship to the research inquiry are examined using an autoethnographic methodology. In particular, various tensions are explored, including the role of insider knowledge and ethical practice in social science research. The researcher's reflective journal and ethnographic writing are presented to demonstrate the trajectory and evolution of her perspectives on Confucian traditions over the course of the research investigation. A rich discussion of establishing researchers' identities is also provided.

Keywords: Autoethnography, science education reform, researcher identity, Taiwan, Confucian learning traditions

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Introduction

I am a Taiwanese woman who grew up in Taiwan and came to Canada in 2012 to pursue graduate studies in education. My journey to study commenced in 2014 after a prolonged struggle with subjectivity in my master's research project.

In 2013, I began an examination of Taiwan's science education reform policies from 1990 to 1994 for my master's study (Huang, 2014). I interviewed three policymakers who formulated the reform policies and 10 secondary science teachers in Taiwan. In my role as a researcher, I found myself caught between the conflicting positions of the policymakers and the teachers. Specifically, my initial findings suggested that the policymakers I interviewed believed that Confucian traditions have obstructed scientific innovation and inquiry-based learning in Taiwan. They also perceived Confucian traditions as a cultural burden in Taiwanese society. However, the teachers I interviewed felt pulled in two directions by the contradictory concepts of Confucian learning culture and the new reform initiatives. They viewed Confucianism as a valuable cultural asset that should be passed on through education.

The competing perspectives of the policymakers and teachers made me attentive to the relationship between my life events and academic writing. As a learner in Taiwan, I have witnessed the profound impact of Confucianism within my family¹ and how Confucius' values have brought together people of different social and religious milieus. In particular, Confucius² strongly upheld the value of *ren* [benevolent rule or loving others] in creating the ideal harmonious human; he also valued the concept of *li* [respecting others] as a moral code to maintain social order (Li, 2003). Because of my cultural experience, a part of me shared the teachers' perspective that these values must be preserved and passed on through education.

At the same time, my opposition to Chinese traditional customs, such as traditional discipline in class and submission to our teachers, motivated me to investigate cultural issues in science education in Taiwan. My zeal for scientific values such as wonder, innovation, and respect for nature induced me to support the Western approach to science education that promotes critical thinking and questioning. Therefore, I also concurred with the policymakers that societal values shaped by Confucian traditions might have restricted change in Taiwanese learning culture.

During the research process, it became clear that I could not ignore my dichotomous view of Confucian traditions. I constantly encountered struggles between my cultural experience and the motivation for my research. Countless times during the interviews, I had hesitated, unsure of what to ask or how to follow up because I was afraid of revealing my own bias. I also wrestled with guilt during the data analysis phase because I saw myself as betraying my cultural experience by

¹ My mother and her family believe in a local Taiwanese religion infused with the worldview of Buddhism and identical behaviours of Taoism. My father and his family believe in Christianity.

² Confucius (551 B.C.E.–479 B.C.E.), also known as Kongzi or Kong Fuzi, is recognized as wan shi shi biao (萬世師表), meaning the model teacher of every age in Chinese history. At the time of Confucius' birth, the central authority in China was declining, and all dukes and princes under the federal government were trying to recruit philosophers along with military and political consultants to defend their kingdoms. Confucius began spreading his ideology to his students, who came from many different regions in China to seek knowledge and to study with him. He accepted students regardless of class, gender, or social status, and thus became the first teacher to make education available to all citizens in ancient China (Nivison & Van, 1996). By the end of his lifetime, his philosophy had become the mainstream value system, and he had gained thousands of apprentices and followers. Confucius believed that everyone should be devoted to self-cultivation and practising *ren* and *li* in order to promote harmony. Confucius' legacy and his central philosophy—treat others how they wish to be treated—survive today, and the publication *Analects of Confucius* is mandated to be taught in secondary and post-secondary schools in Taiwan.

undertaking research that upheld Western models. Hence, I struggled to draw conclusions that might lead to the destruction of beliefs in Confucius' values.

While delving into my unreconciled views on Confucian traditions, I began to wonder what cultural experiences have shaped my researcher identity and academic ways of knowing, and have driven my research inquiry in the past and present (Clandinin, 2007; Mitchell, Weber, & O'Reilly-Scanlon, 2005). In what ways, if at all, did these experiences and my role as an insider affect my interpretation of the data and writing of the final text (Hamdan, 2009; Taylor, 2011)? Thus began my journey of self-discovery to make sense of my identities through writing reflexive ethnographies.

The Call of Autoethnography

"Autoethnography calls to me" (Pathak, 2010, para. 2) because it allows me to use personal experience to critically examine my cultural practices (Ellis, 2004). The stories of autoethnographers are not merely personal narratives or autobiographies; the goal of an autoethnographic story is to connect "the autobiographical and personal to the cultural, social, and political" (Ellis, 2004, p. xix). While many methods, such as narratives of the self (Richardson, 1994) and personal experience methods (Clandinin & Connelly, 1994), attempt to study the researcher self. Ellis (2004) described the autoethnographical approach as being self-conscious while exploring "the interplay of the introspective, personally engaged self with cultural descriptions mediated through language, history, and ethnographic explanation" (p. 38). In other words, as Ellis and Bochner (2003) noted, autoethnographers look back on the self (auto) and critically examine the self–other interactions (ethno) in order to uncover the underlying autobiographical experience that shapes their research practice (graphy).

Through autoethnography, storytellers and readers can share the "historic situation," "social structure," and "moment of experience" (Denzin, 1997, p. 39). In addition, autoethnography breaks down the boundary between story giver and story taker, as it creates space for collaboration and ultimately allows them to reach mutual understanding. For instance, through reading Carolyn Ellis' (2004) autoethnographies, I was invited, as a graduate student and novice researcher, to join her community in incorporating the self into my own research and academic writing. I thus found autoethnography particularly suitable for this research inquiry because it allows me to overcome my concern about revealing myself in my research because the researcher's self is at the centre of autoethnography. Autoethnographic writing thus provides me with a way of acknowledging the embodied reality of my cultural experiences.

I conceptualise autoethnography as a space where researchers' personal and professional identities are evolving and constantly interacting. In this space, I allow my personal self to acknowledge my insider knowledge and feel the complexity of my cultural experience; I then turn the reflexive lens on myself and welcome my professional self to use an autoethnographic approach to write about my lived experience. Describing my dilemmas of feeling caught between the Eastern and Western worlds during my research inquiry, I use childhood stories to illuminate the connections between my cultural and research practices. As I have assembled artefacts and excerpts from the reflective memos I collected during my master's research, my researcher identity has gradually come into focus.

Data from multiple sources (i.e., visuals, my reflective memos, and my field notes) helped me to address the research questions guiding this study (Holliday, 2002). I used a number of qualitative analysis tools and techniques for data analysis, including thematic analysis (Creswell, 2007), which involved categorising and clustering salient themes emerging from my reflective diary. This approach allowed me to identify common patterns in the memos and allowed me to explore relationships

among my reflective pieces to make meaning of my researcher identity (Denzin, 1997). Three themes emerged through thematic analysis: researcher's experience relevant to the research inquiry, concern about subjectivity while doing qualitative research, and a learning process of becoming a reflexive researcher. I also employed the constant comparative method to draw out patterns of similarities and differences (Holliday, 2002; Maxwell, 1996). In particular, constant comparative analysis helped me to make meaning as I compared my true experience of the world with research practices in an attempt to make sense of my researcher identity.

Throughout the meaning making process, I maintained a journal to record a true reflection of my interpretations and to examine the logical process that brought me to understand my reflective experience. I was fully aware that a key aspect of qualitative inquiry is to encompass my reflective and recursive processes, allowing me to sculpt the research findings and conclusions. I knew that I must disclose any bias that might lead me simply to attempt to convince myself that I had made everything fit (Creswell, 2007). To increase the trustworthiness of this study, I constantly discussed and critically examined my interpretations during the analysis and writing process with my colleagues.

I provide an intimate portrayal of how my thinking about Confucian traditions has evolved through autoethnography. I write this story to share my reflexive process with those who have also had to negotiate multiple researcher identities. In doing so, I hope to add to our growing understanding of how researchers might negotiate their identities during research inquiry, potentially leading to a sense of positioning.

The First Step: Am I *Taiwan-ren* or *Zhongguo-ren*?

What information about me, as a researcher, must be included in my academic writing? This question arose as I started writing the reflexivity chapter of my thesis. I was stuck at the very first sentence: "I am . . ." Should I identify myself as Taiwanese (台灣人, pronounced *Taiwan-ren* in Mandarin) or Chinese (中國人, *Zhongguo-ren*)? I hesitated, wondering how I could avoid revealing my uncertainty about who I am.

Because of the ambiguity of Taiwan's political status (Rigger, 2011), I vacillated between describing myself as a Chinese learner from Taiwan or a Taiwanese learner from an independent country. Internationally, the island of Taiwan has been recognised as part of the Republic of China (ROC) or as Chinese Taipei. This delicate reality forced me to follow my heart in making a precise statement of how I identify myself: I am Taiwanese. However, my growing concern about using a politically correct name for Taiwan in academic writing pulled me in another direction. As a result of this identity confusion, I turned to the histories I had been told during my childhood, in order to trace the source of my uncertainty as the first step in consolidating my research identity.

I have vivid memories of my grandmother sitting beside me on a grey, cylindrical stone chair as we waited for my school bus. She told me how the Japanese established a public school system in Taiwan that allowed all girls her age to go to school, like me (Ching, 2001). Citizens like my grandmother were identified as Taiwanese islanders (本省人, *bensheng-ren*), descendants of early Fukinese and Cantonese settlers who had migrated from the mainland before the 1890s, during the Ming or Qing Dynasty.

In 1945, the Japanese colonisers returned the island to the ROC, the Nationalist government in mainland China. Thus, islanders of my grandmother's generation experienced both Japanese

colonisation and the social changes after the Chinese Nationalist government took control over Taiwan. Following more than 50 years of separation from the mainland during colonisation, the fundamental feeling of “otherness” has been deeply ingrained in the mentality of the Taiwanese islanders (Fleischauer, 2007).³ For them, mainlanders (外省人, *waisheng-ren*, officials, and civil servants of the Nationalist government) were like another occupier striving to marginalise them. Grandma told me how difficult their lives became under the Nationalist government because most of the food and daily essentials were shipped to mainland China to support the army in fighting the communists. Social issues and postwar inflation built up a palpable sense of disappointment in the Nationalist government amongst the Taiwanese islanders (Lai, Myers, & Wei, 1991). Hence, cultural differences, language barriers, and political divisions intensified islanders’ hostility to the mainlanders.

For a long time, I could not understand why Grandma sounded disappointed when she talked about the Japanese government’s retreat. I began to make sense of her nostalgia as a teenager, when we learned about the 228 Incident.⁴ In 1947, opposition to the Nationalist government turned into a large-scale uprising. Propagating a Taiwanese identity distinct from the mainlanders, students, and social elites initiated the first attempt at a Taiwan independence movement. However, the uprising failed when the Nationalist army began armed suppression—known as the 228 Incident (Fleischauer, 2007). During that time, Nationalist soldiers entered every household to arrest or execute islander elites as well as those who supported rebellion (Lai et al., 1991). Never saying anything about this historical event, Grandma only mentioned that she and her sister had to give up all their Japanese clothes and textbooks because “the soldiers did not like those who read Japanese books” (Author, reflective memo, May 22, 2014).

The notion of otherness amongst islanders became even more apparent through the trauma of the 228 Incident. However, when the Nationalist government lost the civil war in mainland China in 1949, the Nationalist president, Chiang Kai-shek, retreated to the island of Taiwan. Consequently, although Taiwanese society had not yet recovered from the damage of the 228 Incident, a large number of mainlanders, including Nationalist officials, soldiers, and civil servants of Kuomintang, followed President Chiang. This form of national construction left little space for rapprochement between the Taiwanese islanders and the mainlanders (Lee, 1999).

I once asked my parents where our ancestors came from. My father’s only reply was this: “Your grandfather used to say, ‘He would cut off ties with whoever married a mainlander’” (Author, reflective memo, May 22, 2014). Although disappointed with his response, I knew this was a taboo subject, both at school and at home. After all, citizens of my parents’ generation were prohibited from discussing politics under Taiwan’s martial law. This could explain why we seldom talk about politics in my family.

In recent years, my father has begun to tell me his stories, such as his encounter with retired Nationalist soldiers during his military service. As he described it, the soldiers came with President Chiang Kai-shek, “naïvely thinking that they would return to *their* homeland in the coming days [emphasis added].” However, when President Chiang Ching-kuo (son of Chiang Kai-shek) eventually identified himself as Taiwanese rather than Chinese (Kagan, 2007), “these retired soldiers cried like children who had lost their way home” (Author, reflective memo, May 22, 2014). Indeed, for

³ They were influenced by the Japanese policies of assimilation; they had been educated in Japanese and were nostalgic about this period (Chou & Ching, 2012).

⁴ My high school history teacher referred to it as a massacre, and when reading the textbook aloud, always said “this massacre,” even though “the 228 Incident” were the words written in the book.

mainlanders, maintaining a distinction between being Taiwanese and Chinese was the only way to keep hope alive that they would return to the motherland, mainland China.

As a child listening to those who lived the experience, I might have made different meanings from their narratives than I would have as an adult. Nonetheless, recalling my memories of these times as an autoethnographer brings a new dimension to my understanding of Taiwan's history and educational development. Perhaps the stories told by my family have helped me see a clear distinction between being Taiwanese and Chinese. Because of this sense of cultural roots, I feel comfortable identifying myself as a *Taiwan-ren*.

Realising a sense of belonging has helped me to make sense of my research inquiry: I came from Taiwan and I am Taiwanese; therefore, I am interested in understanding the discourse around science education in the context of Taiwan with the hope of making a contribution to the country in which I grew up. Based on this discovery, I continue to investigate my researcher identity through personal narrative and reflexivity within the research process. In the next section, I attempt to answer these questions: What does it mean to be a researcher and, at the same time, a Taiwanese learner, educator, and newcomer in North America?

Educational Development in Taiwan During My School Years

In 1987, the year before I was born, Taiwan's policy leaders lifted the martial law after 38 years. Under the martial law regime, which began in 1949 and was known as the White Terror period, large numbers of social elite, including educators, writers, artists, lawyers, and scholars, had been imprisoned or executed for what was perceived as opposition to the totalitarian Kuomintang—the party established from the Nationalist government (Lai et al., 1991).

In 1949, the Kuomintang believed that the military government was critical in promoting nationalism. The president believed that establishing a unified national identity was the first step in the country's development, due to the antagonism between mainlanders and islanders after the 228 Incident. The result was that divergent political philosophies were suppressed during this regime. The Kuomintang controlled all education sectors, including teacher training institutions, curriculum publishers, and school systems, to suppress political dissidents and inhibit communist activities and discussions of government policies (Tien, 1989).

To consolidate a national identity and establish a sense of cultural pride in Taiwan's people, the Confucian doctrine of humanity (i.e., Confucius' virtues and benevolence) and traditional Chinese ethics (e.g., loyalty, filial piety, harmony and peace, fraternity and faithfulness) were upheld in all educational settings (Lorenzo, 2013). This strategy can be seen in the fact that studies of Confucianism and the Analects of Confucius were mandatory in the curriculum throughout the years of my education, from 1994 to 2006. In addition, as the following vignette elucidates, discipline and social conformity were emphasised during my school years in order to cultivate nationalism in students.

Vignette I: A box of stamps—the military model of education.

In 2013, I returned to Taiwan to interview my participant teachers. The school environment was not much different than I remembered. But what caught my attention was a box of stamps on the participant teacher's desk (Image 1). "Are you still using stamps in students' communication books?" I asked. Excited about my observation, the teacher enthusiastically told me the history of his box of stamps, which had been a gift from his teacher.

Image 1: A photo of the box of stamps taken by a participant teacher as visual evidence.⁵



However, the box of stamps brought back different memories for me. The following vignette, from my researcher journal, offers glimpses into the social, historical, and educational background of Taiwan in the 1990s.

I cannot recall what we did during the first day of school, but I always remember how amazed I was whenever my schoolteacher opened the box of stamps sitting on her desk. The box was made from wood, with a glass-like lid. It looked heavy, but I wished I could have a box like that for my collection of coloured pens.

I still remember vividly the day when I first got a “Likes to talk” stamp in my communication book. Every morning, we had a ceremony of raising the national flag, where all of us stood at attention, singing the national song, and saluting the flag with our right hands beside our heads. Once, the boy standing beside me and I were caught talking during the flag hoisting ceremony. As our punishment, we were made to stand in a half squat for the rest of the period while the principal gave a speech. It was a good lesson for me, because my mother seemed disappointed in me when she saw the “Likes to talk” stamp in my communication book. Mother quietly signed beside the stamp to show that she was aware of my misbehaviour; she then walked into her room, where she stayed for the whole night. I was puzzled, as no one cared to explain why we should salute and stand at attention to a flag.

⁵ The photo is modified to protect participants’ actual names and his institute.

The stamps effectively communicated various messages about our behaviours in school to our parents, such as “Good,” “Ordinary,” “Needs to improve,” “Good luck,” “Forgot to bring books,” “Forgot to bring tissues,” “Didn’t do homework,” and “Late to class.” We would get a reward if we managed to collect one hundred “Good” stamps in our homework and communication books. Interestingly, I always have a picture in my mind of all the schoolteachers carrying their boxes of stamps, running around the campus and awaiting any opportunity to stamp messages in our communication books. In the six years of my elementary school life, I learned the ways in which we could easily gain the “Good” stamps. It was like a game between my teachers and me; I always won. (June 18, 2013)

The box of stamps symbolises for me the nationally controlled education of my school life. Discipline was highly emphasised in our daily routines. We were addressed and recognised by our student identification numbers instead of our names. Officers of military education, who overlooked student affairs, supervised and evaluated our behaviour in school. Girls were not allowed to have their hair touching their shoulders; boys had to have crew cuts. When we saw teachers or officers in the hallways between classes, we had to stop and salute them. In every classroom and on the school playground were photographs of President Chiang Ching-kuo and Dr. Sun Yat-sen—Taiwan’s national father. At the start and end of class, we saluted not only our teachers, but also President Chiang and Dr. Sun.

Numerous studies have suggested that East Asian countries (e.g., Taiwan, South Korea, Hong Kong, and Singapore) have similar education environments because Confucianism dominates societal values and has profoundly shaped the learning traditions (Nguyen, Terlouw, & Pilot, 2005). One commonality, for instance, is that teachers are highly respected in Confucian-heritage cultures (Chou & Ho, 2007). Students, therefore, tend to willingly obey their teachers. In interactive classrooms of the West, however, this behaviour is considered a sign of passivity (Biggs, 1998). Drawing on these discussions, some scholars have concluded that teachers’ beliefs about preserving Confucian traditions in these societies might lead them to substantially resist contemporary pedagogy (Baron & Chen, 2012; Chou & Ching, 2012).

Nonetheless, based on my personal experience, I would describe the sort of discipline seen in Taiwan as the military model of education, rather than the influence of Confucian traditions. Confucianism and Confucian heritage have shaped my cultural experience in different ways, which I describe later in this paper. Now, I present a memory that illuminates the social and educational changes that occurred in Taiwan; these experiences have motivated my research into Taiwan’s science education reforms.

Vignette II: A stack of handouts—educational reforms.

During my high school years in the late 1990s, the Taiwanese government made earnest efforts to reform educational systems and implement inquiry-based pedagogical approaches in response to global trends in science education. For me, the memory of stacks of handouts symbolises my high school life and the burden on teachers to maintain the traditional education system.

When I was in high school, teachers kept a stack of handouts from several traditional, ministry-approved textbooks. Even though educational reforms were beginning to be implemented, we, the students, were still being bombarded with handouts and exam-

practice handbooks. Although the new curriculum emphasised active learning and application of knowledge, the national exam still focused on evaluating our factual knowledge. On the news, politicians proposed their own visions of education policies; however, it seemed to me that they threw out ideas just to test the reactions from teachers and parents.

Being trapped between the changing education policies and the reality of the actual classroom, my classmates and I felt like guinea pigs undergoing experimentation in the name of education reform. Because we were uncertain about our education, most of us went to “cram schools” every night until 10:00 p.m. We actually ended up trusting cram school teachers more, because they gave us surefire ways to achieve high exam scores. We were also constantly told to ignore the news regarding the latest curriculum guidelines and only focus on the preparation practice for the university entrance exams. Indeed, I came to learn that no matter how we felt about memorising formulas without fully understanding them, this was the only stepping-stone to the best university in Taiwan. Even though I decided to put more effort into studying my handouts from cram school, I began to question the purpose of public schools and wondered why schoolteachers did not teach like the cram school instructors. Teachers in cram schools would give us standard answers to exam questions and help us organise the most relevant information to memorise it quickly. (Author, reflective memo, December 19, 2013)

Throughout my high school years, I remember politicians in the media talking about Taiwan’s economic boom in the 1970s and 1980s as a miracle (Woo, 1991). They asked citizens to be proud of Taiwan’s incredible economic growth, considering our ambiguous political position between mainland China and America.⁶ While I buried myself in my studies, headlines on the evening news told of yet another new strategy, proposed by scholars who had been to the United States, to create Taiwan’s second economic miracle.

Since the end of martial law in 1987, many Taiwanese scholars, scientists, and political activists who had moved to North America during the White Terror period to promote Taiwan’s independence and democracy from overseas had returned. Moreover, social changes and the influence of global economies had forced Taiwanese education planners to realise that Taiwan’s science education needed major reform to support the advancement of industrial structures (Law, 2004). Rather than the traditional approach to vocational training, Taiwan’s manufacturers now required diverse talents to enhance scientific productivity and technological innovation.

The return of talent began to make an impact on education development in the 1990s. The most remarkable example was Dr. Yuan-Tseh Lee, the first Taiwanese Nobel Laureate in molecular chemistry (Law, 2004). Upon his return from the United States in 1994, he led Taiwan’s Council on Education Reform until 1996 and was the minister of education from 1999 to 2002. My teachers often motivated us to study hard and become the next Dr. Lee.

Against the backdrop of political and social change, the huge influx of returning scientists played a crucial role in education policy planning (Law, 2004). Of the 31 scholars on the Council on Education

⁶ After World War II ended, the ROC lost the civil war, which drove the Nationalists to Taiwan and other islands. Due to tensions between the United States and Russia, the Truman administration resumed economic and military aid to the Nationalist Party of Taiwan in order to stop a communist invasion. This support lasted until the United States formally recognised the Communist Party of China in 1979.

Reform, 13 had received postgraduate degrees in North America. The committee was mandated with creating a constitutional change in the educational system to improve Taiwan's international competitiveness (Ministry of Education, Taiwan, 2003). In particular, the Western approach to science education was introduced first in the primary and secondary science curriculum (Chou & Ching, 2012).

As a student, I sensed my own resistance to the reformers and witnessed my teachers' frustration. Having been influenced by the discourse around teachers' resistance to education reforms, I came to Canada to pursue a graduate degree, hoping to find solutions to improve Taiwan's education systems.

Negotiating Researcher Identity: The Process Unfolds

When I came to Canada as a Taiwanese learner, I became aware of the influence of one's cultural heritage on their epistemic practice. Comparing my learning experience to that of North American students, I realised that my silence in class was not commonly perceived as the process of thinking and learning (Li, 2003), as I had been told in Taiwan. As more differences in our learning behaviours became apparent, I became frustrated—especially when I saw teachers in Canada engaged and become overjoyed with hands-on science activities that could help them explain concepts easily in class. I can only remember my science learning experience as memorising tricks to quickly answer the exam questions and do well on the national exam.

Consequently, I often contested traditional teacher-centred methods and educational values in the Taiwanese society, seeing them as the result of Chinese students' lack of independent thinking skills and scientific innovation in the beginning of my graduate studies. While trying to adjust and cope with my cultural shock in the education setting, I was also drawing on these experiences as a starting point for my research inquiry. Thus, for my master's research I investigated the perceptions of Taiwanese policymakers and science teachers about the reforms and their implications for practice.

During the first round of interviews, I was surprised that all the policymakers confirmed my belief that the Chinese culture dominated by Confucian traditions *is* the main obstacle to science education reform. Interestingly, though, none of the teachers mentioned that their educational philosophy was based in Confucianism. This was a constant juggle for me as a novice researcher, because I thought that I might be seen as asking leading questions. Therefore, I tried to convince myself that this was my own bias, and I refrained from asking the teachers about their perspectives on Confucian epistemologies. I sorted through my feelings in one of my memos:

I believe that teachers are heavily influenced by the Confucius' traditions, but they did not mention any values related to Confucianism. Is it because Confucianism was an innate influence that even teachers themselves did not recognise? . . . How could I determine whether their teaching practices are based on Confucian epistemology or constructivist approaches? (July 18, 2013)

Even during the second round of interviews with the teachers, my attitude towards Confucian traditions remained unresolved and constantly came into my thoughts. It often occurred to me that the policymakers were right that Taiwanese teachers are influenced by Chinese traditions and Confucian values, which has led them to resist the reforms. The following reflective memo, written during the data analysis phase, illustrates my concern about my bias:

I used to have the same perspective as these policymakers; I thought the traditional learning culture and Confucian traditions were the primary obstacles to scientific advancement. However, I somehow disagree with this view now because I feel that the policymakers used Western standards of teaching and learning to assess Taiwanese teachers' and students' cultural learning behaviour. . . . Am I doing the same? (September 18, 2013)

I remained concerned about my bias even after I had finished the interviews. The conceptual lenses through which I had been examining my findings and my reflexive understandings evolved as I began looking critically at the trends emerging from my conversations with teachers. In particular, when I revisited the transcripts and teachers' journal writings, I pushed myself to look closely and experience the stories told by each teacher: the frustration and their early teaching, conflicts between their mentors and their preservice education, negotiation between parents and administrators, equality of urban resources, support in professional development, expanding educational infrastructure and new directions for education. This is when I realised that a number of their teaching practices fell into traditional and contemporary approaches, even though most of them asserted their opposition to the educational reforms. As I repeatedly revisited the data and my interpretations, the shifts in my own thinking about Confucianism became apparent.

Revisiting my researcher journal—travelling between the Eastern and Western models.

At the last stage of data analysis, I found that Confucian values might have positively influenced teachers' engagement with constructivist pedagogies.⁷ This discovery provoked me to go back to my researcher journal to criticise the assumptions and biases that I brought to my research. My thinking began to shift when I reviewed the following memo:

In 2012, I visited the secondary school that I had attended in Taiwan. When I was there, the school board was hiring new teachers, so there were many novice teachers lining up for the opportunity to demonstrate their teaching abilities. Something that stood out . . . was that most of the candidates were carrying large suitcases. The suitcase mystery was solved when a teacher opened her suitcase prior to her teaching demonstration. I was amazed to see all kinds of materials for classroom activities, but no handouts. Instead of getting handouts, students did hands-on activities and engaged in discussions in a candidate's demo lessons. . . . Not that long ago, I was taught not to speak in class, but now I saw this novice teacher encouraging students to interact with each other. I asked an interviewer, an administrator in the same school, if teachers really use this approach in their regular classroom practices. The examiner answered, "Not really. This is not teaching; novice teachers always try to be creative in the beginning." (December 29, 2013)

The suitcases symbolise my learning experience in Canada, where the classroom environment is more interactive and student-centred. When I wrote this memo, I drew on the body of literature about teacher resistance to education reforms (Beijaard, Verloop, & Vermunt, 2000; Olsen, 2008). Writing about my conversation with the school administrator after the teaching demonstration, I sought to describe my belief that certain societal values remain firmly entrenched and continue to constrain the possibilities for change in Taiwanese classrooms.

⁷ At this stage, I began to notice that some of the teachers' view of Confucian learning principles was in fact compatible with contemporary approaches that focus on providing meaningful education to all children, meeting the individual needs of the students and nurturing their unique talents.

Repeatedly revisiting my researcher journal shifted my attention from the suitcases to other characters. Putting myself into the examiners' and school administrators' shoes, I realised that it was not Confucian traditions that have obstructed scientific innovation and inquiry-based learning in Taiwan. Rather, changing an educational system is complex and requires time for the stakeholders to readjust their roles.

Indeed, reflecting on my experiences in high school, the discussions on how science teaching should be reformed in Taiwan seem revolutionary. The examiners and school administrators who had been trained in a system based on the military model under political repression might have less tolerance for new teachers' experimenting with nonconventional methods. Hence, the transformative period at the hands of a newly democratic government might have precipitated a culture of insecurity and distrust between school administrators and education reformers in Taiwan.

A new understanding of my cultural practice vis-à-vis Confucianism.

Once I had revisited my learning experience and critically examined my cultural experience, I learned to distinguish the original Confucian doctrine of humanity from how it was used by the totalitarian Kuomintang government as a political tool to promote Chinese nationalism. In particular, the original Confucian doctrine of humanity was grounded in *ren*, benevolent rule or loving others, and *li*, respecting others.⁸ According to Confucius, when everyone in society practises these virtues, a harmonious society and peaceful world can be created (Li, 2003). However, the Kuomintang government embedded Confucian values in its political ideology of establishing a Chinese cultural root, and used Confucius' values as justification for the military model of education. For example, students and citizens had to respect public servants, such as teachers and government officials. The practice of respecting others became a norm that emphasised social conformity and submission to authority.

Therefore, my initial understanding of Confucian learning traditions was in fact infused with the military-based customs that emphasise discipline in class and submission to authority. Consequently, I had been convinced that Confucian learning traditions impeded scientific advancement and progress in Taiwanese society, as Confucian values have profoundly shaped the epistemic culture in Taiwan's educational systems. This may also explain why Taiwanese advocates targeted Confucian ethics and traditional Chinese virtues while initiating political and educational reforms in the 1990s. The policymakers I interviewed might believe that eliminating Chinese influence through de-Sinicisation is the key to creating a distinct Taiwanese identity and promoting an independent Taiwan (Hao, 2010).

Final Note: An Ongoing Transformation

In this autoethnography, I have illustrated the process through which my researcher identity has evolved. I started by attempting to resolve my internal conflicts, which resulted from my incompatible views on Chinese traditions and the heritage of Confucian values. Through reflexivity, I entered the process of negotiating between my cultural experience and my research inquiry. The investigation suggests that I was in fact opposed to the military model of education, as well as to the

⁸ According to Confucius, to practice *ren* and *li*, people should treat others how they wish to be treated. He also encouraged learning from the past and studying classic literature, because he believed that learning helped to cultivate one's virtues. When everyone in society practises Confucius' virtues, children respect elders, siblings, and friends are kind to each other, citizens are grateful to their government and governmental officials love their citizens (Li, 2003).

ways through which Confucius' virtues were used as a political instrument to promote Chinese nationalism. This discovery highlights the ethical responsibility of researchers.

Inspired by Maxwell's (1996) concept of writing "researcher experience memos" (p. 29) throughout the investigation, I wrote reflections on my personal experiences and emotions, and the expectations that were relevant to my master's research project. Many scholars have encouraged academics to study the self while engaging in qualitative inquiries (Collins & Gallinat, 2010; Gamelin, 2005). Knowing one's becoming, as Clandinin (2007) asserted, allows researchers to make sense of their experiences, actions, and reactions within certain social realities. Indeed, I came to realise the value of writing researcher experience memos when these reflective pieces later became useful resources as I tried to situate myself in my master's research inquiry. Attarian (2011) described this process as using "reflexive and interpretive tools to explore the historicity of self and its actions, and to reflect on constructions of identity and agency" (p. 157). That is, through reflecting on their own stories, researchers can construct, uncover, negotiate, and further establish their researcher identities. An established research identity is vital for social scientists to situate themselves between real and research worlds. Only in doing so can we bring theories to life as well as bring life back to the theories.

While not every researcher has experienced the internal struggles I outlined above, similar experiences in different spaces and times can bring different perspectives and new stories to light. By sharing my experience, I hope that this work can find other researchers who hover on the precipice of knowing and are searching for guidelines on how they should act so as not to bias their research inquiries. By understanding the self, I also hope to prompt others to consider the question of who they are and what constitutes their researcher identity, in order to expand and enrich their positions as researchers now and in the future.

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Book Review

Knowledge as Enablement: Engagement between Higher Education and the Third Sector in South Africa

Edited by Mabel Erasmus and Ruth Alibertyn

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Anne Harley, University of KwaZulu-Natal, and Mark Butler

According to its preface, *Knowledge as Enablement: Engagement Between Higher Education and the Third Sector in South Africa* aims:

1) to stimulate debate around issues at the interface between higher education institutions and the third sector of society, and 2) to highlight the unique role of such relationships in contributing to knowledge enablement. (p. 18)

It seems appropriate, then, that the book should be reviewed from the perspective of both those within and outside the academy. One of us is an activist scholar (D'Souza, 2009), based in a South African university, and one of us works outside of the academy in what we term uncivil society as well as in bits of civil society. Over the years, we have chosen to work together on a fairly regular basis, reflecting on and learning from this engagement with each other. We bring our resultant thinking to this review.

As is clear from its title, the book is concerned with issues of knowledge, enablement, and engagement, primarily between the university and the third sector. By the *third sector*, the book means that sector which is not the public (government) or private (business) sector. The editors consider this concept to be inclusive of many types of organised civil society, not simply formally registered nonprofit organisations. *Enablement* is used in contrast to *empowerment*, as explained in the first chapter of the book. Whereas empowerment implicitly suggests that one more powerful entity (the higher education institution) transfers some of its power to the less powerful entity (the community), enablement is about making something possible, and is "collaborative, reciprocal and focused on mutual transformation" (Janze van Rensburg, 2014, p. 41).

The editors argue that community engagement (CE), as the third core function of higher education institutions (alongside teaching and learning, and research), often involves relationships with the third sector. "However, what happens at the interface between higher education institutions and third sector organisations has not been explored in any depth in the South African context" (p. 22), and "there remain conceptual and theoretical gaps in this knowledge field [of community

engagement]” (p. 17). The book tries to fill these gaps, drawing on collaborative research activities and working from the premise that there is an essential link between enablement and knowledge creation, and that through CE, both higher education and third-sector organisations can potentially create knowledge to solve relevant problems.

Bringle’s foreword to the book clearly situates the book within a “fundamental epistemological shift in higher education,” from the academy as the creator of knowledge, which is then disseminated to communities in order to fix problems, to “a new model of civic engagement that emphasises partnerships that are democratic (just, participatory, inclusive), reciprocal, and transformative” (2014, p. 19). The term, enablement, attempts to capture this. It thus critiques the model of communities as dependent, and seeks to shift the power relations between universities and communities by offering both a critique of existing forms of CE, and models of alternatives.

The book is divided into three sections. The first is primarily conceptual, whilst the second focuses on the third sector (to address a limited understanding of the sector). The final section considers specific case studies and new approaches, including a variety of possible forms of CE. Most of the contributors to the book are either from the University of the Free State, or formerly from this institution, or with links to it. Two contributors are from nonprofit organisations, whilst the remainder are from other universities in South Africa and the United Kingdom. Many of those within universities have some kind of community development experience or linkages.

The editors comment that scholarly work on CE “actually disturbs us and forces us to rethink the normal patterns of thought, belief and the very nature of scholarship” (p. 24); and reading the book has indeed profoundly disturbed us on a number of levels. Whilst *Knowledge as Enablement* is a collection of fairly disparate chapters with no stated overarching paradigm or theoretical or conceptual framework other than the broad position discussed above, there are clear underlying assumptions threaded through whole that we would like to interrogate.

Whilst the book problematises some of the ways in which CE has been conceived and applied, the very language of community engagement is about an other, about something out there from which the university is separate. This assumes and reinscribes a fundamentally elitist and ultimately contemptuous relation between the academy and its other, “the community.” This slippage between what the book claims to be trying to do, and what it seems to us actually to be doing, is also evident in the concept of enablement. This is presented as an attempt to address unequal power relations but in fact assumes, a priori, and reinscribes an assumption of “disability,” along the lines of the “capacity building” (which assumes a lack of capacity) so popular within NGO-speak.

Throughout, whilst third sector is used as a more inclusive term, in fact it is formally registered nonprofit organisations that are primarily discussed. Within the book’s index, there is no entry for social movements at all; and indeed, reading the book would lead anyone to believe that this critical form of organisation was basically absent from the South African context. This is particularly disappointing given the growing body of work that argues that significant knowledge and theory is generated by social movements (Barker & Cox, 2002; Choudry, 2009; Choudry & Kapoor, 2010; Eyerman & Jameson, 1991; Foley, 1999; Gouin, 2009; Harley, 2012; Scandrett et al., 2010)—which could, presumably, “enable” universities.

In fact, far from engaging subaltern social movements, the book’s editors say that whilst higher education institutions could collaborate with a variety of civil society organisations, “when the aim of CE is to engage more closely with the developmental spaces where grassroots struggles are taking place” (p. 26), it is often useful and productive to partner with nonprofit organisations. But what if

these institutions (along with universities, faith-based organisations, and community-based organisations) are themselves deeply implicated in the ongoing assault on, and containment of, popular power or grassroots struggle? It is problematic not to recognise and problematise the deeply distorted and distorting relations of power and representation that these organisations assume and hold on to to mediate, gate keep, and control the community—including how these relations radically infantilise the community, assuming and reinforcing the notion that “the people” cannot (and indeed, may not) present themselves but must accept their relentless representation by others. Indeed, the entire book largely ignores the ways in which the alliance of capital, the state, and the development project (as punted by the third sector) have created precisely the state of things that urgently requires redress (and hence, theoretically, CE). By not recognising this, and by entering into partnerships with structures that reinforce and reinscribe relations of injustice and inequality, however committed we may be to doing good in the world, we will simply reproduce that which we claim to be attempting to address.

Whilst we are critical of this book, nevertheless, it remains a useful contribution to the field, particularly for those already involved in CE. As mentioned above, there is relatively little published work on CE in the African context, and even less in South Africa; *Knowledge as Enablement* certainly does not fill this gap, but it does at least begin a much needed conversation, starting from a point that already problematises the field.

However, as Gibson (2011) commented:

The intellectual committed to social change, Fanon argues, is fundamentally alienated from the people and needs to fundamentally change the elitism, internalized values and ways of thinking they have imbibed. (Section 2, para. 1)

We start from the premise that universities are not monolithic; they are contested spaces and places. Nevertheless, as Gramsci (1971) argued, university intellectuals largely play the role of consolidating the hegemony of the ruling class. We do this through our teaching (in what we teach, and how we teach it, and why we teach it), through our research (in what we research, and why we research, and how we research), and through our community engagement (in who we engage with, and why, and how). What we need now is deep critical reflection, and a moving against and beyond what is (Holloway, 2010).

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Report

Sexual Violence Research Initiative Forum, 14–17 September 2015, Spier Estate, Stellenbosch, South Africa

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The Sexual Violence Research Initiative Forum (SVRI), initiated in 2003 by the World Health Organisation with support from the Global Forum for Health Research, encourages research on sexual violence, particularly in settings that are resource poor. In 2015, the SVRI Forum was hosted by the South African Medical Research Council, with sponsorship from several partners. The theme, “Innovation and Intersections,” invited participants to debate key issues around the prevention of sexual violence. According to the conference chair, Claudia Garcia-Moreno, these include:

the role of social norms in prevention of different forms of gender-based violence; the importance of integrating prevention and response into other sectors and programmes; the global trends and best practices in terms of prevention and, most importantly, what is working, why is it working, how do we measure success, how much does it cost and how do we scale up?ⁱ

More than 300 delegates to the SVRI Forum had access to 115 oral, and 59 poster, presentations as well as to 12 special sessions engaging in key aspects of sexual violence and sexual violence research methodologies. The SVRI Forum also pushed the boundaries of information dissemination through the SVRI Forum Theatre where participants shared their research through short videos or films and TEDx Talks.ⁱⁱ An interesting aspect of this SVRI Forum was the encouraging of partnerships, not only North-South, but also South-South, and academic-practitioner research partnerships.

In the opening plenary, three keynote addresses provided a platform to contextualise the debates on sexual violence. Professor Rashida Manjoo, who held the position of United Nations Special Rapporteur on Violence against Women for six years, spoke first. Her UN work had entailed “monitoring and reporting on States’ compliance in responding to and preventing violence against women, its causes and consequences, both generally and in different country contexts.ⁱⁱⁱ” Giving an overview of the status of violence against women in different countries, she argued for the importance of seeing the intersectionality of discrimination and violence against women, in particular the relationship between socioeconomic conditions, race, and historical and cultural contexts. She also emphasised the importance of seeing and acknowledging the interaction of interpersonal, institutional, and structural violence. She therefore argued for a holistic approach to addressing sexual violence, pointing out that violence against women is a barrier to citizenship, depriving women of their human rights. The lack of a situated understanding of violence against women underpins a “one size fits all” approach from the state—which clearly does not work. She warned, however, against creating hierarchies of violence against women, for example, sexual violence in conflict, human trafficking, and so on, pointing out that it does not serve women well.

Dr Shereen El Feki, the second keynote speaker, spoke of the prevalence of violence against women in the Arab region, and how the state is often both the author and the perpetrator of violence against women. She made clear the relationship between “what happens in the bedroom and what happens in the public.” She, however, pointed out that sexual attitudes and behaviours across the Arab region were changing, indicating their intersections with politics and economics, religion and tradition, gender and generations.

Noura Bittar Soborg is a Syrian refugee (now living in Denmark) and a women’s rights activist who made the voice of refugee women heard at the conference. Since the war in Syria started in 2011, people have fled and filled refugee camps—with half of the refugees being women and girls. She painted a picture of women who carry fear with them: fear of sexual violence, but also fear of losing the right to access or parent their children should they leave the marriage.

The second plenary focused on interventions, with the presentation of “The Good School Toolkit: Systematic Approach to Preventing Violence Against Children in Schools,” offering an interesting model of drawing on education, a whole school approach, and a health programme. The concern that the violence the children experience becomes part of their constructed worldview, which in turn has an effect on how they approach the world, throws light on the continued violence in communities. While piecemeal interventions in school don’t get traction, the “good school” is positioned as the best framework in which to bring about systemic change. A challenge, however, was experienced in that the school curriculum is brimful, leaving little time for added prevention programmes. This speaks to the prevention programme—albeit evidence-based—being brought by outsiders and not developed with the school and its personnel as partners. A further consideration pertains to the question of how being part of such a study influences stopping violence. How can the research simultaneously be an intervention? How might theory of change be utilised with the participants (principal, teachers, and learners) to provide some insight in this regard?

The range of parallel sessions focused on topics such as:

- Conflict, post-conflict, and emergencies: Community responses, tools and methods, and prevention
- Parenting and families in East and Southern Africa
- Sex work: Epidemiology and responses
- Perpetration
- Violence against children and adolescents
- Men and masculinities
- Trafficking, transactional sex, and sexual exploitation
- Sexual and gender-based violence in South Africa
- Health and violence
- Using research to influence policy
- HIV and violence
- Violence against children and adolescents in school
- Faith-based initiatives
- Mental health
- Understanding risk and protective factors

- Primary prevention in East Africa
- Care and support
- Addressing violence in people with disabilities.

The special sessions included:

- Seeing how it works: Transnational dialogue on the use of the visual and digital media in girl-led “from the ground up” policy making to address sexual violence
- The vision workshop: Three keys to accelerating impact while maintaining self-care practices
- Integrating culture into interventions to prevent gender-based violence
- Strengthening health services to deliver care and prevention
- Violence against women and girls: The Lancet special series
- Addressing violence against women and girls across development sectors: Initiate, integrate, innovate
- What works to prevent violence against women and girls initiative
- Drivers of violence: The multi-country study of violence affecting children
- The challenges and hopes of interventions around gender equality and intimate partner violence prevention
- The power to prevent: Oxfam’s use of innovative, participatory strategies to change negative social norms that perpetuate VAW/GBV.

The poster sessions included themes such as:

- Prevalence of sexual and intimate partner violence across contexts
- Men and masculinities
- Violence against children and adolescents
- Interventions
- Trafficking, sexual exploitation, and violence against vulnerable groups
- Health and violence
- Health and justice
- Tools and methods.

The commitment of the SVRI Forum to engage with the very important theme of “Innovation and Intersection” in terms of addressing sexual violence from a health perspective revealed interesting knowledges. The vibrant atmosphere demonstrated the enthusiasm of the SVRI Forum delegates in focusing on contributing to changing the lives of women and girls in relation to sexual violence.

In reflecting on the programme and the presentations, on who was there and who was not there, I note, for example, that the knowledges of the teachers—in a context where education is seen as a key tool for prevention—seemed to be relegated to the margins or if present, were presented on

behalf of the teachers. This clearly calls for more and closer links between health and education in addressing sexual violence. I also note the absence of girls and young women in speaking out about their experiences of sexual violence, and what they think could be done. Boys and young men too, could have been part of debate on what might work as solutions. The knowledges of the LGBTI community seem to be marginalised too—in a context of Africa, where “other” sexualities are criminalised.

So, whose knowledges were presented? How were these knowledges produced? By whom were these knowledges produced? And to what end? How were the participants from resource-poor settings participating? Who is disseminating the knowledge? Who is talking on behalf of whom? If we had heard the voices of the women and girls on the ground, how might that have contributed to our deeper understanding of addressing sexual violence in South Africa, Africa, and the rest of the world?

ⁱ Conference programme, p. 4, <http://www.svri.org/forum2015/Programme.pdf>

ⁱⁱ <https://www.ted.com/watch/tedx-talks>

ⁱⁱⁱ Conference programme, p. 6, <http://www.svri.org/forum2015/Programme.pdf>