Values-based self-reflective action research for promoting gender equality: Some unexpected lessons

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The idea of using values as a means of guiding our research decisions and judging the validity of our claims of knowledge is well established in literature on the self-reflective genre of action research. Values in action research should always result in virtuous behaviour – to promote the general social good. However, ideas of what constitutes the social good may differ from context to context. This article problematises the notion that 'good' values lead to 'good' action. Presenting one research project as a case study, I show that the articulation of values does not always result in what I, as a researcher and White, middle-class woman, would recognise as health-promoting action. Yet, the participants view such behaviour as a legitimate means to improve their quality of life, at least in the short term. First, I describe the social and cultural context of the research, before highlighting some value conflicts that emerged, as the participants and I critically reflected on our understanding of more equal and healthy gender relations. It is important to expose such conflicting value interpretations through critical self-reflection, so that researchers and participants can work towards a deeper mutual understanding of how to best address complex social issues such as gender relations in specific social contexts.

Keywords: Action research, gender relations, HIV prevention, research as social change, self-study research, values-based practitioner self-enquiry

Introduction

Self-study action research such as that propagated by Jean McNiff and Jack Whitehead in their joint and separate writing (see, for example, Whitehead & McNiff, 2006; Whitehead, 2009; McNiff, 2013) is conceptualised as a means of enquiry, whereby practitioners investigate, interrogate and evaluate their practice in order to improve what they are doing and to influence the learning of others. As a tertiary researcher

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committed to the critical self-reflection of my own practice, I employ research methodologies that encourage participants to do the same. I judge the validity of my work and any claims to knowledge against my values which then become "living standards of judgment" (Whitehead, 1989: 49).

I proceed from a critical, emancipatory paradigm of action research (Carr & Kemmis, 2003) that aims to attain social change by creating space for people to critically reflect on, and problematise their current circumstances and thinking, with the ultimate aim of encouraging them to accept the responsibility for taking action to emancipate themselves from real and self-imposed social and epistemological oppression (Freire, 1995). I thus work with participants to identify and articulate upfront the values that we wish to embody in our respective practices, and to which we agree, and for which we will hold ourselves accountable.

The reasoning goes thus: if we all hold ourselves accountable to values that promote the social good, then we would act in a more virtuous way that could also influence others; social change should then ensue, as a result of accumulative individual change (Whitehead & McNiff, 2009). Action research also abolishes the notion of the academic researcher as the 'expert' who imposes his/her own knowledge on others, in order to guide the process (Zuber-Skerritt, 2011). Instead, it regards participants as practitioner-researchers who, by dint of their insider knowledge, are viewed as the most capable of finding workable ways to improve their own educational/social situations by engaging in cycles of enquiry that require them to think, act, evaluate and plan (McTaggart, 2012).

However, this process is not as simple as it first appears. While, in theory, 'good' values may be identified and conceptualised relatively easily by all concerned, agreeing on how they should be acted out in practice is more difficult. For example, in contexts of poverty and social disadvantage, the value of self-improvement may, in fact, lead to outcomes that are perceived as 'bad' or unhealthy: Take the case where a young girl engages in unsafe sex in return for nice clothes and other material gifts.

By critically reflecting on my own actions and potential influence as researcher in a two-year research project, I explain how I came to be aware of the latent danger of expecting participants to adopt and embody values, as I understand them, without considering how they could be interpreted and acted on differently in their specific social and cultural contexts.

This article thus problematises the notion that engaging in a values-based self-enquiry process of action research would always lead to good or virtuous outcomes.

Making my own 'self' explicit

How to reflect on my own positionality in the study is a challenge. How do I make explicit my own values and background in relation to those of the participants, since

my 'self' is a powerful source of influence on the study? As a researcher and professor, I recognise that, initially, participating teachers, and even more so learners, view me as an 'expert' – someone who can give them the answers they seek – and I have to work hard throughout the research relationship to convince them that they are the 'knowers' in this context.

How do I take into consideration my privileged upbringing, and how do I avoid having my own passion to make some contribution to reducing gender violence via my research not become 'the agenda' for those teachers with whom I work?

Background to the project

The project was conceived for the purpose of HIV prevention – through a gender lens. International literature emphasises the link between unequal gender relations and HIV, a fact that has prompted both South African and international bodies to make it a focal point in HIV-prevention education (Kaufman, Shefer, Crawford, Simbayi & Kalichman, 2005; Larkin, Andrews & Mitchell, 2006; Department of Basic Education, 2012; UNAIDS, 2010).

Participatory approaches to HIV and gender education can be effective in changing thinking and behaviour (De Lange, Mitchell, Moletsane & Stuart, 2012; Wood, 2012). For this reason, I chose an action-research approach that would require all the participants, including myself, to critically reflect on the data generated throughout the process to guide the project (Stringer & Beadle, 2012).

The socio-economic context of the particular project that I, as the researcher guiding the action research process, will use as a case study to reflect on my own learning can be best explained by an extract from one of the participating teachers' reports that is typical of all six schools in the project (Yin, 2013):

> *Our school is situated at the heart of K location. Most of our learners come from the nearby squatter camps where parents are often sick (many from HIV-related illnesses), unemployed or abuse alcohol. They live on grandparents' social grants or child support grants. There is no stable income. We have quite a number of orphans and vulnerable children at our school, and some of them are heading their households. They struggle to pay school fees and to buy uniforms. With such rampant poverty, many come to school on empty stomachs (Teacher, School 3).*

I worked with 12 volunteer teachers (2 males and 10 females) and 82 learners (at 3 primary and 3 high schools) to help them develop the capacity to act as agents of change regarding unjust and unequal gender norms in their communities. The project was conducted in two phases. In phase one, I worked first with the teachers to help them become aware of the link between HIV transmission and gender inequalities; reflect on their own gender constructs and how these constructs would affect their teaching; integrate gender education into their teaching and/

or implement programmes in their wider school community, and develop their leadership competencies for this purpose.

In the second phase, the teachers and I collaborated to work with volunteer learners to develop their capacity as peer educators in gender-based issues. Throughout the process, values were used as the basis for interrogating and evaluating our own constructions of gender relations. All the participants identified and operationalised the values they thought would best bring about more equitable gender relations in their specific contexts. Copious data were generated by means of visual methods such as drawings and photo-voice, focus groups and participants' written project reports and reflections (Guillemin, 2004; Wang, 1999; Krueger & Casey, 2009).

For the purpose of this article, I am drawing on my own critical reflections on aspects of the data in terms of the articulation and acting out of values. Although other publications have emanated from this study, highlighting successful project outcomes and contributing to the knowledge of how to work with teachers and learners towards gender equality, when I started to examine the data from a values perspective and to critically reflect on my own thinking and how it could possibly have influenced the interpretation of the data, I realised the potential danger of assuming that my interpretation of specific values, and how they should be embodied in real-life contexts, would automatically be similar to those of the other participants (see Wood, 2009a; 2009b; 2012).

Although I intended to act for the social good and had developed ethical procedures that seemingly protected the participants from harm, after critical reflection on my own assumptions and thinking, I became disconcerted that I could have unwittingly encouraged behaviour that would result in negative emotional, social and financial outcomes for the participants, due to my own strong beliefs about gender relations (for a full report of ethical measures, see Wood, 2012).

The values guiding the study

Values refer to the ideas we hold about what we believe to be good and right and, as such, guide our decisions (Lombardo, 2008). Whitehead (1989: 47) suggested that we should use our values as "living standards of judgment" against which to evaluate our actions, in order to ensure that we act to promote the social good. The participants in this study, teachers and peer educators, were encouraged to identify and operationalise their values, so that they would be able to monitor their thinking and actions against such values when they critically reflected on their actions and beliefs relating to gender relations.

In both phases of the study, respect, sincerity and ubuntu were high on the list of values identified by the participants. These were also values that I hold dear, and we seemed to be in agreement in our practical articulation of them. For example, after

collaborative deliberation, the teachers explained how they thought these values should be operationalised:

- Mutual respect (for example, being non-judgemental; listening to what others think, feel and say; being caring, compassionate and empathic).
- Sincerity (for example, modelling desired attitudes/behaviour; living out our values; not having hidden agendas; being open and honest with partners and people in general) as the values to which they would hold themselves accountable.
- Ubuntu (for example, treating others as you want to be treated; being kind to others; partnerships for the benefit of both in a relationship) (extract from workshop notes, May 2009).

The learners also identified similar values in their visual data, as indicated in Figure 1.
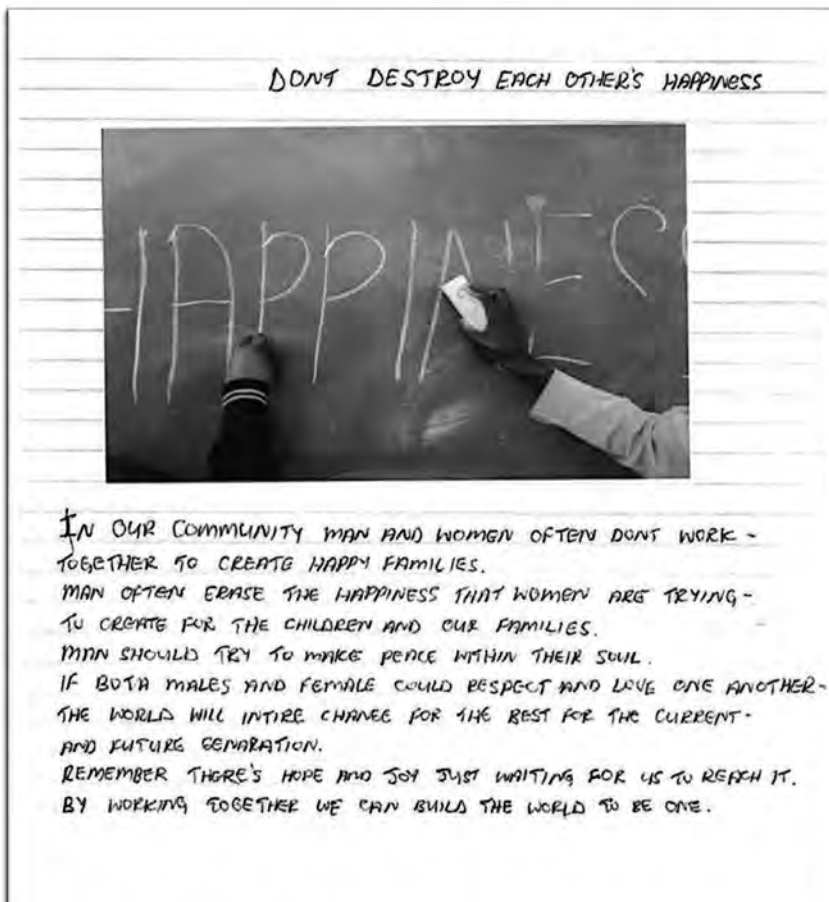
Figure 1: Values of respect and love and working together towards better gender relations

However, although in theory we had come to an agreement on how values should be lived out, further reflection on the data made it clear to me that the values agreed on within the research context were not being lived out in their own relationships,

or rather that there may be a disconnection between the values we state publicly and how they are lived out. The descriptions of the values resonated with my understanding of what is acceptable and what is not; it became apparent to me that these definitions were more of an imagined state of affairs than actual reality for the teachers.

For example, when we started to relate our understanding of values to the life experiences of the participating teachers, different interpretations surfaced that might lead to outcomes which, in fact, contradicted the ones that I had imagined. When teachers explored further how they had been taught to convey respect in their communities, the interpretations differed, to some extent, from those we had constructed earlier.

For instance, in terms of how the value of respect should be lived out, the following definitions emerged:

- Respect for those older than you – you cannot challenge or question your elders, particularly your mother-in-law or husband's family.
- Respect for your husband, as the head of the home – you cannot negotiate condom use, and simply turn a blind eye to infidelity.
- Respect for the ancestors – you have to perform the necessary rituals/ consult sangomas to ensure good luck and protection from illness and other misfortunes, which practice often had considerable financial implications (extract from workshop notes, October 2009).

The participants mentioned that, if people were to transgress these deeply entrenched cultural and gender norms, they would risk being ostracised by both family and others in the community. The majority of the teachers also indicated that, although they might not agree in theory with how respect was construed in their communities, they found it easier to comply with rather than to challenge them and cause possible conflict within their own families.

One teacher complained that she was not happy with the way in which her daughter was being treated by her extended family (not allowed to wear short skirts, had to do all the chores), in comparison with the freedom her son had to dress as he wished, and not help around the house:

> *I get so tired of fighting; sometimes it is not worth it and then I just keep quiet – I do not agree with what they [husband and his mother] say, but I do not want to make a fuss, because they will never change their minds (Female teacher, School 4).*

This compliance, albeit only on the surface, reinforces male hegemony (Hearn, 2004), in that this teacher chose to embrace practices which denied her the right to freedom of action and expression and which entrenched the idea of female subservience. When I critically reflected on my own thinking in this instance, I began to wonder whether my interventions would make any difference to the status quo. Would the

participants really be able to make any difference in terms of gender relations in the face of such strong communal and cultural norms? What would happen when they actually tried to live out their values in everyday life? Would this cause them more harm than good, and what right did I, as a researcher, have to encourage them to challenge the system if it might result in physical, emotional or relational harm?

In the next section, I will present evidence from the data to substantiate my concerns.

Reflecting on the role and meaning of values in the project

According to the argument put forward by the proponents of a values-based self-enquiry genre of action research, if people do not live according to their values, they experience themselves as "living contradictions" (Whitehead, 1989: 49), creating a certain amount of cognitive dissonance (Festinger, 1957). This feeling then propels them to take action to create harmony between their thoughts and their behaviour. However, what happens when the violation of espoused values is common practice in the environment? Or when people's ideas of how the values should be lived out differ? How simple is it then for people to act in accordance with their values? And what happens when attempts to live out values incite others to react in an abusive manner? And what if people living in contexts of poverty, violence and hopelessness found ways to improve their lives that I would have condemned as unhealthy, but that they perceived as being a legitimate means to better their circumstances?

As I critically reflected on the data and my own reactions thereto, these and other questions started to trouble me. It was clear that the situation was more complex than I had first imagined. If I did not take this complexity into account in my interaction with the participants, sustainable changes in their behaviour were not likely to occur. Moreover, our relationship would not be based on mutual trust and honesty, as they would be likely to tell me what they thought I wanted to hear, rather than what they were really thinking.

Participants might agree on the need to live out 'good' values and they would agree on a 'healthy' acceptable way to operationalise such values within the research context; but, how would they be able to enact such behaviour in environments that were not very conducive to change?

The 'living contradiction' that is the school system

The Department of Basic Education (2011: 8) promotes adherence to the values of "democracy, social justice and equity; equality; non-racism and non-sexism; Ubuntu – human dignity", which are taken from our Constitution. These values should form the basis of all gender relations in schools, and of learners and teachers in the broader community. However, the very context of education in the majority of schools in our

country denies these values, given the social inequalities and injustices that prevail as part of the daily reality of both teachers and learners (Bloch, 2009; Nkomo, 2013).

Extracts from teacher-project reports illustrate that schools are not always healthy, safe and caring environments:

> *We have quite a number of orphans and vulnerable children at our school, and some of them are heading their households. They struggle to pay school fees and to buy uniforms. With such rampant poverty, many come to school on empty stomachs. There is also a high degree of absenteeism due to the fact that girls are expected to take care of their sick parents and siblings. This sometimes leads to drop-outs, and some girls take on sexual partners for financial support. The huge social and economic problems experienced by the learners make them very sensitive and easily angered at school (Teacher, Primary School 1).*

> *It is also believed that disciplining learners, especially boys, should only be done by male teachers. The teachers also expect different behaviour from boys and girls, where girls are expected to 'respect' the boys and do the cleaning work around the school (Teacher, High School 4).*

Even more disconcerting to me was the fact that male teachers turn a blind eye to the issue of girls being sexually abused by initiates; the female teachers are helpless to interfere, because it is viewed as "a cultural issue".

> *The issue that concerns us most is the behaviour of the boys, particularly when they return from the initiation schools. These amakrwalas or initiates demand a special respect from the girls, but [they] treat these girls badly. They bully the girls, forcing them to have sexual relationships with them; and if they do not comply they beat them. They also compete about having multiple partners in the same school, which, according to them, is done to prove their masculinity (Female teacher, High School 5).*

It appears that, in such environments, girls especially are at risk and have little choice in deciding to live out their values as they see fit – if they want to exercise their right to refuse sex (based on the values of respect, equality, ubuntu), they are beaten. Due to entrenched cultural norms, some of the female participants also considered themselves unable to intervene to help these girls, as this would cause their male counterparts to be angry with them – something they clearly found to be uncomfortable.

> *I do not want to interfere, because then he will make my work life bad – that man is friendly with my husband, which makes it worse because then I will suffer at home as well if I say anything (Female teacher, School 2).*

Although difficult for me to condone, I have come to realise that I need to put my own indignation aside, and that these types of issues need to be taken into consideration when discussing expectations for change with participants. I am not saying that change is impossible, but that the potential negative consequences, fears and entrenched beliefs should be openly discussed, so that alternative strategies, that are less risky for personal wellbeing, can be found.

Tension between the ideal and lived reality

The data revealed that gender-based violence seems to be something that both children and teachers in the community witness on a daily basis. As their pictures show (see Figure 2), men are depicted as violent, abusive and controlling of women – behaviour that is often fuelled by alcohol abuse.

Figure 2: Examples of leader experiences of gender relations

The children are exposed to this on a daily basis in their own homes, in contrast to the message of respect, love and care for the other, preached by myself and their

teachers. The pictures that the children drew shocked me and made more apparent the difference between their daily reality and mine. If gender-based violence was common behaviour in the relationships in their community, I realised that my encouraging them to stand up against it could not be done without also discussing the possible negative consequences of any action that attempted to challenge the status quo.

This understanding was reinforced when I studied the data produced by the teachers depicting their own gender relations. Their pictures indicate that women who attempt to stand up to men run the risk of being abused, either physically, emotionally or economically.
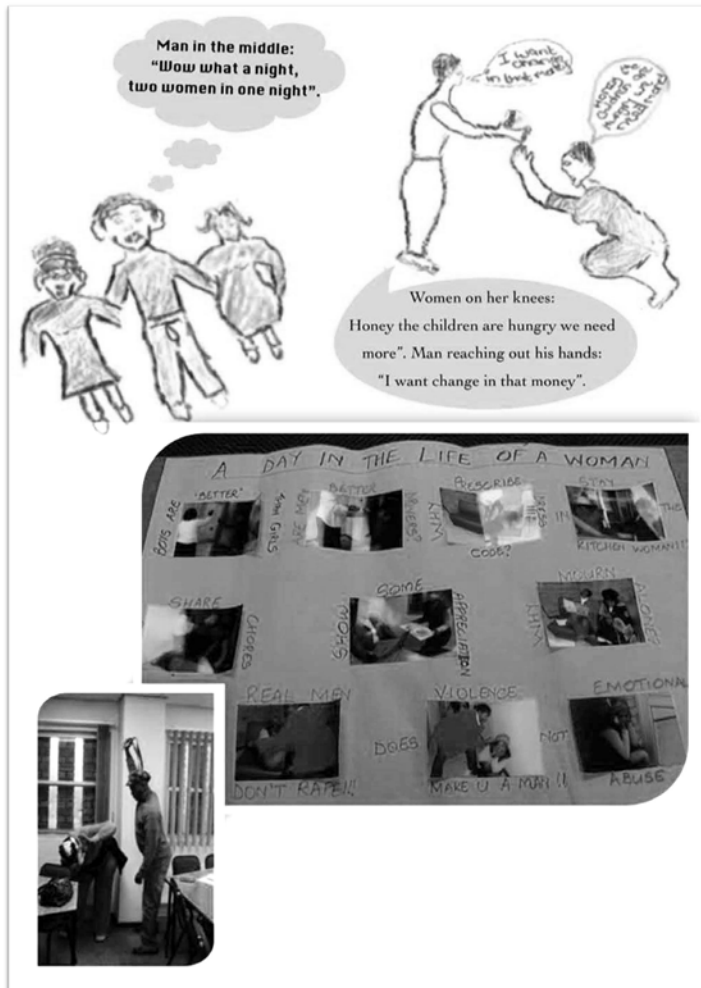

Figure 3: Teacher depiction of gender relations

Several of the participating teachers also indicated that they had experienced violence and/or infidelity in their own relationships. As one female teacher (School 1) wrote:

> *We Black women, it does not matter if we are educated, we still get abused and we are not meant to say anything about it. I cannot complain about his girlfriend and he says he uses a condom with her, but not with me. But I just shut up, because I think of the kids and the money he brings in.*

It is interesting to note that this participant started to talk about Black women in general; she then lapsed into the first person, which made me think that she is talking from experience. If teachers themselves are living in such relationships, how would they be able to teach children in an authentic manner?

The visual representations of gender relations and the accompanying narratives indicated that they did not – or could not – embody in their own lives the values they were supposed to teach to others. Teachers in this study valued respect; yet the community understanding of respect between genders was based on male hegemony, to which they tended to conform. They valued honesty, yet they turned a blind eye to partner infidelity and lying about money to keep the peace. They valued trust, yet they could not trust their own male partners who would not tolerate any questioning of their activities. They valued autonomy, yet they could not share in decision-making – even about how many children to have, or to negotiate safer sex. They valued ubuntu, yet gender-based violence was a 'normal' part of many of their relationships.

As a researcher, subscribing to Freireian theories of education (Freire, 1995), my initial response was to point out these inconsistencies, and to encourage them to take action to emancipate themselves from this oppression. However, as I reflected more deeply on the data, and my role as a potential influencer of their behaviour, I became aware that if they did attempt to act according to their values, they might suffer undesirable consequences.

In one incident, a teacher participant confided in me that she had told her husband that she would not sleep with him until he wore a condom, as she knew about his extramarital affair. This attempt to embody sincerity, practising what she preached, caused serious ruptures in the marriage with the potential of harming both her and her children's well-being. It also made me very conscious of the potential harm that my intervention could incite: if teachers act on these 'good values', the result may not be as 'good' as intended.

I learnt that influencing others to adhere to my conceptualisation of what behaviour is/is not acceptable in a relationship would come at a price for participants, and that ethically I would have to discuss this with them, and to build in support for those who needed it. I was also disconcerted to learn that perhaps I was also guilty of not practising what I preached.

Whose interpretation of values is right?

I have written and talked on many occasions on the dangers of moralising about HIV and AIDS, as well as sexuality, and I would certainly consider myself to be open-minded

and accepting of diversity. However, I was shocked at how the learner participants depicted transactional sex as a legitimate means of attaining material goods and social standing. Although the learner narratives described this kind of behaviour as harmful, follow-up discussion with a high-school focus group revealed that several of them thought that this was perhaps the only way for them to 'improve' their lives: "It is not good for the girls to do this; it harms them and can make them sick; but what else can they do? They might as well, because they will probably get raped anyway" (Male, 17).

On reading this transcript, my first reaction was to think: "But this behaviour is not right ...", and to prepare to present my own arguments to convince the children that their reasoning is faulty. However, would such a reaction not be what they were expecting, and to which they were accustomed? Would it not discourage honesty in their responses, saying to me what they think I wanted to hear, rather than to make them think critically and deeply about the consequences of such actions, and what alternative behaviours could help them attain the admirable goal of 'improving' their lives?

I preach dialogic interaction (Winter, 1989), but was I practising it? Although all these children were attending school, they were all living in poverty and did not have the same life opportunities as those from the more affluent neighbouring communities. Whose interpretation of this behaviour would be more likely to resonate with them? While agreeing that entering into relationships for material gain does demean the woman, feeds into gender inequality, and perpetuates male hegemony, the participants could also argue that it was, in fact, an indication of increased autonomy that would lead to a better quality of life in terms of material gain.

One female participant argued that many of the girls who engaged in relationships with men, who were able to provide material support, had high status among their peers, because they had such "nice things" and were seen to be "grown-up". Thinking long and hard about this, I have come to realise that, as a researcher, I need to listen to such interpretations and even admit their validity in certain contexts, while opening up critical discussion about other interpretations that would lead to more healthy outcomes.

Another example that convinced me that I needed to adhere to my espoused principles of critical and open dialogue was the assertion that some boys at the school were selling drugs, a fact that gave them high social status and financial gain (see Figure 4). As one boy said, "Guys don't need education; they can get what they want through doing this" (Male, 15).
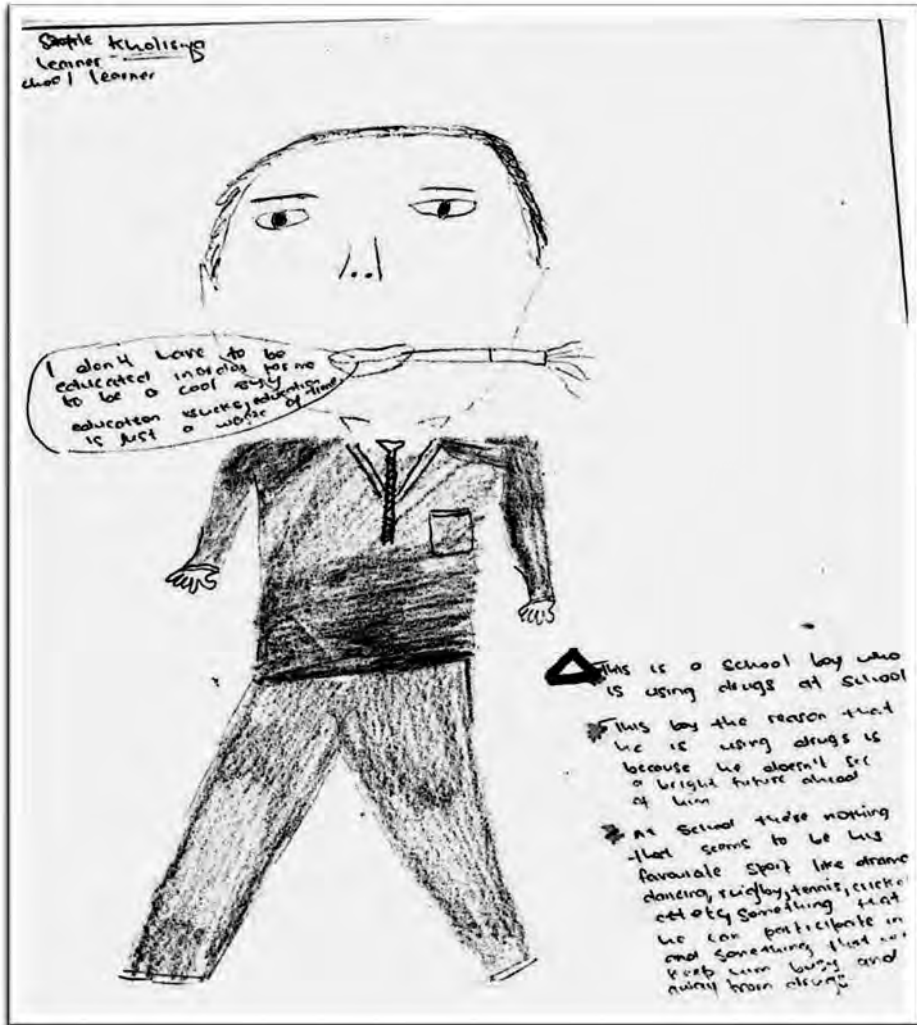
Figure 4: Depiction of drug seller at school

This made me realise that such behaviour could be regarded as entrepreneurial rather than deviant and morally wrong. Of course, the end result would not be a healthy outcome for anyone concerned, but immediate gains are more important to adolescents than long-term consequences (Kollins, 2002). This understanding helped me shape my next input with the participants. I adopted the role of 'devil's advocate' and presented such 'deviant' behaviour as legitimate examples of living out values. This approach incited the participants to engage in lively discussion, and to come to the conclusion for themselves that more healthy alternatives did exist for living according to their values.

As one male participant (15) said after this session: "If I respect a girl, then I do not want her to do anything that might hurt her, such as getting pregnant, so I am going to make sure I have safe sex from now on."

Lessons learnt

By reviewing my data and my own role as researcher through a specific, values-based lens, I learnt some valuable lessons which, I believe, will improve my future interventions with teachers and youth on gender issues. First, the living out of espoused values is not an easy task in environments where they are violated on a daily basis. Secondly, if participants do attempt to embody their values in the way that they operationalised them within the research context, it could put them in danger of physical and/or emotional abuse. Because I had encouraged such behaviour, I would feel responsible for the consequences and for violating the ethical principle of 'do no harm'.

Lastly, when I work with youth, I have to be open to differing interpretations of values, rather than to impose my understanding of what is 'good' and 'virtuous', developed as it is from a history of middle-class privilege. I have learnt that I have to look deeper, and work hard to ensure that my values, tinged by a hint of Calvinistic conservatism (my Scottish background), do not interfere with the dialectical creation of knowledge that I so highly value in my relationship with research participants.

This is particularly so if I want to embrace the feminist values of self-reflexivity in relation to deepening an understanding of others.Although I considered my practice to be in line with the assumptions and principles of critical pedagogy (Freire, 1995), I had to admit that I had not been thinking deeply and critically enough about my own role in this project. The lessons learnt will help me ensure, in future, that I explore with the participants the possible consequences of adopting more gender-equal behaviour within the contexts of patriarchal domination.

Ethically, I will have to point out that more assertive behaviour towards gaining equitable gender relations, although ostensibly for the long-term good, might result in immediate negative circumstances. I will also have to ensure that psychosocial and material support systems are in place, should any of the participants need them. Although this is a requirement of most ethics boards, I am also aware that it is very easy to say that this is available on paper, but more difficult to ensure that free and supportive services are readily accessible to participants at all hours of the day and night. It is even more difficult to encourage them to make use of such services.

I have also learnt that I need to spend more time discussing different interpretations of values, and the implications of acting for short-term gains in terms of long-term negative consequences. The most important lesson, in my mind, is the need to continually check and question my own instinctive reactions to the

participants' responses, to ensure that they do not unduly jeopardise the research relationship or aims.

I have much evidence from the data generated from this project that points to its 'success'. I have both written and visual evidence of how participants changed their views on gender relations, and how they increased their attempts to make a positive change in their communities. However, this critical reflection has also left me wondering whether the behavioural and cognitive changes they have reported, can, in fact, be implemented and/or sustained, given the many challenges they face in terms of gender equity in their own personal contexts.

Writing this reflection has made me aware of how easy it is to colonise the minds and values of others who live in more challenging contexts than I do. I now have a better understanding of what it means to live out these values in specific contexts. This understanding will help me be less simplistic in my interventions, promote gender equality, and continually check my actions against the Freireian principles on which I claim to base my practice as an engaged researcher.

Changing social norms and behaviour is never easy. It is easier to interpret the data to show that we, as researchers, have influenced positive change, when perhaps we have, in fact, caused unintended harm, or merely imposed our ideas on participants who have learnt that it is easier to accept what a figure of authority says than to challenge it.

The aims of this article were to problematise the notion that values-based action research would always promote the social good; to show that critical self-reflection can lead to the discovery of some uncomfortable truths, and, at the same time, to argue that, if we do not do this, we run the risk of being "living contradictions" who may cause more harm than good (Whitehead, 1989: 49).

Values-based self-enquiry is, therefore, necessary in order to ensure that we discover the otherwise concealed findings of our data. It is also important to recognise that it is not a simple matter of encouraging others to live out 'good' values to improve their quality of life, particularly when dealing with complex issues such as gender relations. It is hoped that the examples offered in this article will encourage other researchers to think more deeply about what they are doing, and what this 'doing does', through critical self-reflection of their own practice.

Endnote

Ubuntu is a Nguni word which, although not able to be directly translated into English, basically means that we only find fulfilment through our interactions with others. Human kindness and brotherly love are thus central to the practising of ubuntu (http://africanhistory.about.com/od/glossaryu/g/Ubuntu.htm).

Acknowledgements

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