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An outsider-researcher's tale: The paradox of studying 'my own people' from a peripheral position, perspective and context

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Abstract

This article reports on my experiences as a novice researcher as I traverse the challenges of being a postgraduate international student while conducting fieldwork in my own country. While my research aimed to determine the strategies of five public elementary school principals who facilitated school turnaround and the political and economic factors that influenced their strategic decision-making, I will demonstrate how I found myself on the 'outside' as a researcher as I studied 'my own people' in 'my own context'. I discuss how I practised researcher reflexivity to deal with the challenges posed by being an outsider in the research processes characterised by my status as a postgraduate student studying abroad and a former private school teacher. I also consider how reflexivity was central to the critical lens that I used in my research to investigate the underlying political and economic factors that influence the phenomenon of school turnaround.

Key terms

Research reflexivity; critical realist research; neoliberalism

A prelude

My interest in questioning the underlying conditions that impact on educational processes began when I took my first job as a teacher in an international school. The school experienced a series of fiscal, administration and organisational problems caused by parents' loss of trust in the school. This led to resignations of teachers and staff, and a drastic decline in student enrolment. This almost resulted in bankruptcy and the school closing down. But instead of stopping the school from operating, the school administration took a brave move to re-build the school. By the time I entered the school as a high school teacher, this restoration had already begun and I became part of the team to 're-engineer' the school. The principal at that time, newly hired and recruited from another sister school, was the key instrument that changed the status of the school from low-performing to improving. He made dramatic school improvements which led to increased enrolment, improved teachers' delivery of instructions, enhanced parents' engagement and overall school development. Our team was highly dedicated and, in such a short time, the school made progress again. Looking back at that experience, I realised that I

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was part of the team who achieved *school turnaround*; a quick and dramatic school improvement in a short time (Hickey, 2010). It was this experience that led me to New Zealand to study a master's degree in educational leadership to further my knowledge about school reforms and improvements.

Coming from a country far different from New Zealand, I expected to gain more knowledge in my postgraduate studies about school reforms and improvement, as New Zealand is known for high academic standards and achievements. However, my studies in New Zealand opened my mind to different, but relevant, concepts about educational leadership. I was introduced to the effects of neoliberalism in education and how this global force has come into play (Ochwa-Echel, 2013). Allowing me to study neoliberalism in my context made me realise that neoliberalism has also greatly affected our educational system. This conscious self-analysis and learning renewed my awareness and understanding of my education system, especially since neoliberalism is rarely addressed by educators and scholars in my country. Through this reflexive self-analysis, I realised that both school reform and neoliberalism have influenced me as an educational leader.

My master's dissertation was a critical qualitative study that investigated the concept of school turnaround, which is a relatively new school transformation approach in my country. It considered the political and economic factors that have influenced principals' own strategic responses. The schools that have successfully achieved turnaround in the areas of National Achievement Test, dropout rates, and repetition rates were studied to investigate the strategies that principals used. These strategies were compared and contrasted to recent national policies from my country's Department of Education. In doing so, I hoped to gain an understanding of the underlying political and economic structures that influence principals to implement these particular strategies. This article explores the reflexive 'backstory' of my research journey by detailing the ontological, epistemological and methodological tensions and challenges I faced as I found myself as an 'outsider' conducting research in 'my own context'. For the sake of confidentiality, particularly in light of current political and economical events in my country, my country will remain anonymous throughout this article.

The researcher's tale

I began my research journey by reviewing literature on school turnaround; however, I soon realised that there was limited literature about this phenomenon in my country. This compelled me to review literature from other, more developed countries. Yet the differences between my country, a developing country, and developed countries, where the majority of the literature originated, became increasingly apparent. This presented challenges in being able to adequately contextualise school turnaround within my context. To address this, I realised that I needed to gain greater contextual understanding of education in my country. I started to read about the low National Achievement Test scores and how dropout rates and repetition rates have been alarmingly high in recent years. I then reviewed literature about the implementation of recent education reforms where it revealed that there had been only minimal gains from implementing major educational reforms like the Basic Education Reform Agenda, School-Based Management, and a K-12 system (UNESCO, 2016). It was then that I looked into what other countries do to help low-performing schools improve. From this I gained an understanding of school turnaround as a significant innovation for school reform.

In my review of literature, I found that the idea of school turnaround has spurred discussion among educational leaders in the last decade (Murphy, 2008; Peck & Reitzug, 2014). The concept of turnaround schools has drawn the attention of educational leaders in various countries because it is intended to dramatically improve schools which seemed immune to reform. However, I discovered that turnaround leadership has its origins in the private sector through the application of strategies used to save failing companies (Cucchiara, Rooney, & Robertson-Kraft, 2015). Government leaders and school policy makers have adopted and applied turnaround leadership in an educational setting in a bid to achieve quick and dramatic improvements in chronically low-performing schools (Murphy, 2008).

This caused me to ask questions about the underlying agenda for applying these strategies in our public education system. It was then that I began to consider how I might study this phenomenon in my country and I chose to do so by investigating the strategies that principals implemented to achieve school turnaround and comparing these with the Department of Education policy. This made my study new and relevant to our country's educational system for a number of reasons. For one, the idea of school turnaround had not been researched in my country. Secondly, there were limited studies that focused on neoliberal reforms and how these affect the public education system. This made my research both timely and original.

I initially planned to use interpretivism as the meta-theoretical foundation in my research. However, after reviewing the literature, I was exposed to the principles of critical theory and critical realism. In reading more articles and discussing the topic with my supervisor, I became interested in studying the phenomenon of school turnaround in relation to political and economic factors present in our education system. It was then that I decided to shift to critical qualitative research and add two more questions in my original set of research questions: (1) How do principals' turnaround strategies compare and contrast with those identified in the national and international policies? (2) How do the national and international policies influence principals' strategic decision-making? With these additional research questions, critical theory was the most appropriate epistemological paradigm to use because it involves and acknowledges different forces such as political, historical, economic and sociological factors that influence people's decisions, behaviours and beliefs (Savin-Baden & Major, 2013). Ontologically, my research was underpinned by critical realism as one of the goals of critical realism is to explain causation. This can be achieved by identifying how human agents explain and experience causal mechanisms and by identifying the critical social elements that affect human agent's interaction with these causal mechanisms (Branann, Fleetwood, O'Mahoney, & Vincent, 2017). My research aligned with critical realism because it centred on understanding how principals respond strategically to the effects of wider political and economic forces.

From a peripheral position, perspective and context

Although I grew up and have been educated in my country, I consider myself to be an outsider in the process of conducting my research. Breen (2007) stresses the importance of a researcher being fully aware of one's personal motivation in conducting the study, and part of this is positioning oneself as either insider or outsider in relation to the research domain. My educational and professional experiences have always been in the private sector, which has a set of processes and procedures completely different from public schools. This made me an outsider in my research context as my study focused on turnaround strategies used by public school principals. In my country, involving public schools in a research study requires gaining permission from different offices under the Department of Education. In terms of academic goals and targets, the Department of Education has a set of objectives for all public schools, unlike the private sector where all schools have their own objectives and goals. Public schools also enact a number of nationwide policies and school policies, whereas private schools implement policies that will help in the achievement of their school's distinct mission and vision. All these deviations and differences between the focus of my study—public schools, and my own comfort zone, private schools—challenged me as a researcher as I navigated the route of an outsider-researcher.

This situation placed me in an advantageous role during my data collection. Since the principals were also aware of how educational processes and procedures between private and public schools differ, they treated me as someone ignorant of public school policies and programmes, and, consequently, regarded themselves as 'expert' about the research subject. This made the principals expand on concepts and explain their answers in a detailed way to make sure I comprehended their responses. I found myself following up on questions and clarifying terms to make sure that my understanding was correct. Often, when I was tempted to presume the meaning of principals' answers, I dismissed my own thoughts and clarified the meaning with the principals. This is similar to the experiences of

Merriam et al. (2001) who also found that being an outsider made a researcher elicit more thorough explanations compared to insider counterparts who were assumed to 'already know' most of the respondents' answers.

Another factor that located me as an outsider was my new-found knowledge about neoliberal education reforms in the global context (Ochwa-Echel, 2013). Neoliberalism is a political and economic ideology which advocates that human potential can be achieved by liberating their entrepreneurial freedoms and skills (Cassell & Nelson, 2013; Ochwa-Echel, 2013). This view emphasises that the individual, not the state, is responsible for his or herself (Ochwa-Echel, 2013). Cleary (2015) explains that neoliberals regard individuals as needing constant persuading and stimulating. Thus, neoliberalism aims to create a 'manipulative man' who can be controlled by the state through various management measures in an attempt to create free markets characterised by competition and choice. In my country, neoliberalism is evident in the way that private organisations have flourished while public education has declined. I was aware that my own stance regarding neoliberalism could affect the research processes and outcomes. For this reason, reflexivity enabled me to expose my views and beliefs about neoliberalism and it prompted me to consciously focus on the voices of the participants and on what their interview data revealed. Nevertheless, my growing understanding and awareness of neoliberalism positioned me as an academic outsider, especially since neoliberalism is rarely discussed in my country, even within academic circles.

Lastly, I also consider myself an epistemological and ontological outsider because of the critical lens that I bring to my research. Despite the limited availability of educational research in my context, few studies have brought a critical perspective to the investigation of educational practices, policies and reform. I used critical theory and critical realism as the meta-theoretical foundations in my research, which allowed me to investigate the influence of political and economic forces on the phenomenon of school turnaround. Critical realism allowed me to study the principals as human agents and this enabled me to identify how they resist, duplicate and/or transform these neoliberal agendas. I believe that this outsider perspective was needed to bring fresh and critical insight to the phenomenon of school turnaround in my country.

Studying 'my own people': The challenges of reflexivity

There were a number of challenges that I identified in pursuing my dissertation. First, I recognised that my dissertation could be an avenue for exposing the hidden, causal economic and political mechanisms that educators and researchers in my country often overlook. Because of this I had to consistently check that each step in the research process was done with utmost accuracy and truthfulness. Second, upon the commencement of my research, I realised that I would be undertaking a different kind of research study compared to my previous research experience. Because of this, I was consciously mindful of my theoretical positioning and my own presumptions as I was aware of how these might have affected the way I gathered data and interpreted findings.

The importance of researcher reflexivity in the attainment of the goals of this research cannot be undermined. According to McCabe and Holmes (2009), researcher reflexivity is the focused reflection of one's ability to be unbiased while also consciously recognising one's existing biases towards the research. It also involves a process of self-analysis on how various elements affect the research data collection and data analysis (McCabe & Holmes, 2009). Researcher reflexivity was employed throughout this research process to respond to the challenges and to document the research decisions that were made during the literature review, data collection and analysis phase of my research.

Since I had experienced the process of school turnaround in my prior professional capacity as a teacher, I realised that I had to be conscious of how my previous knowledge of this experience might affect the research. Olson (1977) refers to this kind of situation as the state in which the researcher is consciously thinking of both the reality perceived by those who experience it and the reality perceived

by someone outside seeing it from afar. I had to put aside my knowledge and previous experiences of achieving school turnaround and not focus on how I understood it, but rather on how my participants employed strategic decision-making to achieve school turnaround. This kind of reflective practice is called bracketing, which can be used by researchers to recognise and set aside their own experiences from the onset of the research, and remaining mindful of them throughout the process (Speziale & Carpenter, 2007). My position as an outsider helped in this situation since I was aware that public schools operate differently from private schools, and I had to clarify what the principals said in the interviews to make sure that I had understood and interpreted their perceptions as they intended them to be.

One challenge I encountered as a research outsider stemmed from my status as an international postgraduate student. Although some principals were fascinated about being interviewed for a study that would reach an international audience, many of them were not positive because of the fear that they might say something wrong or something that might be considered as critical of our education system and the Department of Education. There were two principals who initially agreed to participate in the study but later withdrew their participation. I believe that this fear of exposing critiques of our education system to an international audience made the principals withdraw their participation. This was evident in the way they reacted to my research information letter once they realised that I was studying in New Zealand. One principal even questioned me, "So will this be read by people in New Zealand?" My positioning as an international postgraduate student seemed to be a barrier for some potential participants because of the associated risk of international exposure.

This concern with anonymity also presented itself in the responses by principals who chose to participate. This was evident at the start of interviews when the principals wanted assurance that their name and schools would not be identifiable throughout the research. I assured them of this by referring them to the information letter and through informing them that codes and pseudonyms would be used throughout the research. Although I cannot be certain, I believe this fear affected their responses to some of my interview questions. Some principals were careful, cautious and measured in their responses, knowing that this study could be read by the Department of Education and an international audience. This made me realise how my positioning as an international research student carried significance in my participants' eyes and how this could potentially impact on my participants' responses.

However, despite fears about the international reach of this research, my status as a young researcher and younger educator helped me establish rapport with my participants. In our country we equate wisdom with age. Since most of the principals were older than me, I approached them with respect. I was also able to build pride in their work by hearing about their best practices for achieving school turnaround and this, in turn, reinforced their success. My position as a researcher and a younger educator also elevated the principals to a higher social status within the interview context. This aligned with our cultural norms, which helped to build rapport with my participants.

In conclusion, this reflexive analysis of my experiences as an outsider researcher during my fieldwork reinforced my own epistemological and ontological positioning. This made me aware of my need to ensure that the voices of my participants and their intended meanings were accurately understood and interpreted. It also brought my own methodological decision-making to the fore as I negotiated my outsider position as an international postgraduate student to gain access to principals and to build trust and confidence within an interview context.

A new way of seeing reflexivity in critical research

Reflexivity has been typically used as a tool to identify researcher bias and examine its influence on the research process and findings (McCabe & Holmes, 2009). In contrast to positivist and naturalist approaches to researcher reflexivity, critical realism applies reflexivity in a unique way. Reflexivity in critical research is achieved by identifying political, social and economic forces, rather than

eliminating and neglecting them and consciously acknowledging how they affect the research process (McCabe & Holmes, 2009). On the other hand, positivist researchers obtain objectivity by seeking to eliminate themselves from the research process and naturalist researchers seek to attain research validity by accounting for aspects of the phenomenon under study. Allen (2004) affirms that critical realists have the opportunity to reflect on their experiences and theoretical stance and consider how these affect the process and findings of the research. This was evident in my research in the way that reflexivity enabled me to consciously acknowledge my own beliefs and positioning (Brannan et al., 2017). I then used this reflexive tool to examine the principals' strategic responses to the Department of Education policies. This helped me to identify how political and economic influences have underpinned the phenomenon of school turnaround. In this way, researcher reflexivity was an important tool for exposing underlying political and economic agendas (McCabe & Holmes, 2009).

These reflexive practices helped me to arrive at my findings and conclusions. These findings showed that principals used three key strategies to achieve school turnaround. These include: 1) establishing community engagement, 2) teaching to the test, and 3) implementing the national policy of decentralising financial accountability and responsibility to schools, private donors and parents. Firstly, the five principals identified establishing community engagement as an effective strategy to achieve turnaround in the areas of the National Achievement Tests, dropout rates and repetition rates. This study found that principals facilitated community engagement through getting the support of teachers, parents and immediate community in the implementation of programmes aimed at school turnaround. A second strategy that principals used to achieve school turnaround was 'teaching to the test'. As described by the principals interviewed, the strategy of 'teaching to the test' varied from providing review classes to explicitly teaching answers to the question items in the National Achievement Test. Lastly, the principals identified that one of their key strategies to achieve school turnaround was to implement the national policy of decentralising financial accountability and responsibility to the schools, parents and private donors. Principals explained that decentralising financial responsibilities had resulted in teachers using their own financial resources to provide for students who lacked food and school supplies. This placed both schools and teachers under significant pressure.

Although these strategies facilitated school turnaround, the use of critical realism revealed that these principals' strategic responses were tailored to the neoliberal conditions present in our public education system. Specifically, the neoliberal agenda was found to enhance accountability, decentralisation and 'user pays', which, in turn, influenced principals' own strategic decisions. These findings show that principals tend to reproduce these neoliberal ideologies; however, in some instances, principals transformed these neoliberal agendas to enhance the educational outcomes of students in their schools. This was seen with the strategy that principals implemented to foster community engagement and partnerships. Critical realism allowed me to consider the long-term implications of the reproduction of these neoliberal strategies. For one, 'teaching to the test' limits a deeper and more critical approach to learning, thus lowering the quality of educational delivery that teachers can provide (Cassell & Nelson, 2013; Lipman, 2007). In addition, decentralisation of educational resourcing requires principals to devote their time and resources to identify operational processes that can fill the financial gaps present in their schools (Jimenez, 1987). Although the principals were able to achieve quick and dramatic improvements in their schools, this study established that this neoliberal agenda could create negative consequences over time, such as a decline in the quality of education and increased educational costs for schools, parents and community.

Conclusion

My experience of practising research reflexivity in studying 'my own people' made me aware of how my own views and beliefs affected each stage of my research process. Reflexivity also helped me to identify and expose how political and economic factors have influenced principals' decisions in

achieving school turnaround. McCabe and Holmes (2009) emphasise how reflexivity in critical qualitative research helps achieve this goal. My experiences of conducting research in my own country shaped my identity as a developing researcher by allowing me to step back into my country with an outsider's lens. Therefore, despite growing up in my country and working there as a teacher, I conducted research within my own context as an outsider. This experience challenged me to consciously interrogate my own beliefs and biases in order to be critically conscious of my participants' responses. In conclusion, reflexivity helped me to bring a critical lens to my experiences as an outsider-researcher within my own context. This enabled me to identify how political and economic factors influence the decisions that principals made to achieve school turnaround.

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