Researching Education with Marginalized Communities

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Overview

Researching Education with Marginalised Communities brings together two important 21st century themes. The authors consider the what, where and why of marginalisation, that insidious phenomenon whereby certain groups of people are deemed inferior on the basis of factors that they cannot control. Through intensive and extensive research the book also explores the role of education research in enabling those involved, whether on the margin or at the centre, to achieve comprehensive awareness of marginalisation and to combine forces to combat the stigma of discrimination. The six groups of marginalised learners included in the book live in Australia, the UK, Continental Europe, Japan and Venezuela, and include mobile circus and fairground communities; teachers of Traveller children; pre-undergraduate university students; vocational education students with disabilities and their teachers; environmental lobbyists and policy makers; and retired people. All chapters explain how researching education with marginalised communities can be carried out effectively and ethically.

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Situating Education Research with Marginalized Communities

Introduction

The world has been, is now and is likely always to be divided and unequal (Martens, Dreher, & Gaston, 2010; Watkins, 2009). This statement is a truism, but no less powerful and poignant for that. It provides both the impetus for this book and the backdrop against which this and the successive chapters have been written. It generates simultaneously seemingly insuperable challenges and potentially innovative and transformative responses to those challenges. And (perhaps most significantly from the perspective of the book) it mandates and warrants specific kinds of strategies by education researchers attempting to engage with the divided and unequal world that we all inhabit.

In particular, the book is concerned (in both senses of that term) with what education researchers can and should do when working with variously marginalized communities. As we explore below, marginalization emerges as a highly complex and diverse concept and phenomenon, and the relationship between education research and marginalization is equally contentious and multifaceted. We have sought in the book to present practical strategies that from our separate and shared experience as education researchers have been successful in intersecting with different manifestations of marginalization, framed by theoretically informed and methodologically rigorous understandings of research, marginalization and how they interact. Furthermore, we are convinced that these strategies encapsulate many of the roles and responsibilities of contemporary education researchers and also of the communities with whom they work.

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Certainly, education researchers are increasingly acknowledging and analysing the wider ethical, political and sociocultural dimensions of their activities. This discussion ranges from contemporary theories in mathematics education (Pais & Valero, 2012) and selecting concepts to explain context in adult learning research (Niewolny & Wilson, 2009) to navigating among multiple methodological approaches to researching intercultural communication (Otten & Geppert, 2009). It also includes elucidating competing meanings entailed in researching climate change (Payne, 2010) and the social justice elements of researching educational quality in low-income countries (Tikly & Barrett, 2011) and the power aspects of researching educational policy (Levinson, Sutton, & Winstead, 2009).

All of this suggests that the issues elaborated in this book are part of a broader and ongoing process of re-examination of the foundations, intentions, effects and impacts of education research across a wide diversity of disciplines, paradigms and topics. That re-examination includes challenging taken-for-granted and sometimes long-held assumptions about what and whom education research is for and how it should be evaluated for its effectiveness and utility. It also involves posing and addressing crucial questions about researchers, participants, stakeholders, gatekeepers and other key individuals and groups who contribute to education research and who have an interest in its outcomes.

This chapter consists of three sections:

- Selected literature about researching education with marginalized communities
- The education research projects that have generated the data presented in the book
- An overview of the structure and organization of the book.

Literature about researching education with marginalized communities

This section presents selected literature about specific aspects of researching education with marginalized communities. The subsequent chapters take up particular elements of that scholarship as they pertain to each chapter's respective focus. Here the emphasis is on tracing some of the contours of the field of scholarship in which the book is situated and to which it is intended to contribute in expanding

understandings of that field. These contours are clustered around three key organizing ideas:

- Marginalization
- Marginalized communities
- Researching education with marginalized communities.

Marginalization

Sociocultural marginalization assumes many forms and has multiple causes and effects. Sites of marginalization include addiction (Lee & Petersen, 2009), age (Elliott & Davis, 2009; Gilleard & Higgs, 2010, 2011; Mégret, 2011; Van Ngo, 2009), disability (Gartrell, 2010; Grenier, 2010; Wendelborg & Tøssebro, 2010), displacement (Price, 2009), ethnicity (Bhopal, 2010a; Chao & Otsuki-Clutter, 2011; Chigeza, 2011; Mansouri & Kamp, 2007), gender (Bawa, 2012; Meth, 2009; Shah, 2010), imprisonment (Pasko & Chesney-Lind, 2010), Indigeneity (Germond-Duret, 2012; Lynch, 2011; Prout, 2009; Prout & Howitt, 2009), mental illness (Bhugra, Leff, Mallett, Morgan, & Zhao, 2010; Bhui, Khatib, Viner, Klineberg, Clark, Head, & Stansfeld, 2008), migration (Anderson, Larsen, & Møller, 2009; Klemens & Bikos, 2009; Maydell-Stevens, Masggoret, & Ward, 2007; Ward, 2008), mobility (Ljujic, Vedder, Dekker, & van Geel, 2012; Shubin & Swanson, 2010), occupation (Batch, Barnard, & Windsor, 2009; Devereux, 2010), religion (Ahmed, Kia-Keating, & Tsai, 2011), rurality (Friederichsen & Neef, 2010; Quétier, Rivoal, Marty, de Chazal, Thuiller, & Lavorel, 2010; Shava, O'Donoghue, Krasny, & Zazu, 2009; Shubin, 2010), sexual orientation (Bjorkman & Malterud, 2009; Gorman-Murray, 2009) and socio-economic status (Ekström & Hjort, 2009; Hardaway & McLoyd, 2009; Waldron, 2010).

The sheer diversity of these manifestations highlights the conceptual complexity and the definitional difficulty associated with sociocultural marginalization. Schiffer and Schatz (2008) noted, 'Definitions or indicators for marginalisation and social exclusion might vary in different settings and regions' (p. 5), while Blume, Ejrnæs, Skyt Nielsen and Würtz (2009) stated baldly, 'No clear definition of marginalization exists'. However, they linked such marginalization with the duration of unemployment, while for Devereux (2010) '[a] defining feature of marginalisation is that decisions taken by those with power over resources are not necessarily taken in the best interests of those who are marginalised'. Similarly, although Apter (2008) reinforced the difficulty of including the outcomes of marginalization in effective social accounting

models, he asserted that one manifestation of marginalization was 'divisive rather than mediating forms of pluralism . . . [whereby] interests become elevated to principles, particularly around parochial affiliations, loyalties and jurisdictions, not to speak of propensities to violence' (p. 255).

Conceptually, marginalization has been connected with the interplay between centre and periphery (Kay, 2011; Keim, 2008; Pinto-Correia & Brennan, 2008) and with largely similar processes such as othering (Angelides & Michaelidou, 2009; Borrero, Yeh, Cruz, & Suda, 2012) and underdevelopment and dependency (Keim, 2008), as well as with its constituent elements such as social isolation (Fields, 2011). Indeed, 'defining marginalization as afflictions of individuals' (Järvinen & Miller, 2010) rather than as symptoms of wider social forces is one means of replicating that same marginalization.

Despite these definitional difficulties, a useful distillation was provided by Schiffer and Schatz (2008): 'Marginalisation describes the position of individuals, groups or populations outside of "mainstream society", living at the margins of those in the centre of power, of cultural dominance and economical and social welfare' (p. 6). This characterization highlights simultaneously the material and theoretical dimensions of marginalization: material because of the practical consequences of having reduced access to power and welfare, and theoretical because of being conceptualized as deviating from 'mainstream society' and 'the centre' (p. 6).

At this juncture, it is helpful to recall a telling statement by Pinto-Correia and Brennan (2008): 'The type of discourse associated with the use of the term "marginalisation" is highly relevant in this context' (p. 13). For this book, which is broadly educational in focus but which traverses a number of education sub-disciplines and intersects with other disciplines such as cultural studies, psychology and sociology, this requires the authors to remain attentive to cross-disciplinary differences and nuances of meaning in using the term 'marginalization'. Perhaps even more importantly, it behoves the authors to ensure that they do not deploy the discourse of 'marginalization' in ways that actually help to replicate the inequalities that they are seeking to make explicit and to contest. For example, the next chapter explores how, unless considerable care is taken, naming practices involved in researching marginalization can serve to perpetuate the apparently different and deficit dimensions of the lived experiences and perceived identities of individual members of particular communities.

Just as there are significant challenges and difficulties associated with conceptualizing and defining marginalization, so too there are complexities connected with identifying and exploring the causes of such marginalization. This is partly because, as noted at the outset of this chapter, marginalization has existed since the beginning of human history, and on that basis and because of its apparent resilience and resistance to amelioration it seems to be hard-wired in human DNA (Starrs & Maher, 2008) and hence an inescapable part of the human condition (de los Angeles Torres, 2006; Katz, 2012; Richards, Pritchard, & Morgan, 2010), in a similar way to ambivalence and ambiguity (de Melo-Martin, 2009; Månsson & Langmann, 2011).

These caveats notwithstanding, some scholars have identified a range of factors and forces as causes of different kinds of marginalization. Some of these have been broader influences such as globalization (MacKinnon, Cumbers, Featherstone, Ince, & Strauss, 2011; Purkayastha, 2010) – including the assertion that 'marginality appears to be the hidden other of global citizenship' (Balarin, 2011, p. 355) – and religion (Greene, 2009).

Ray (2010) illustrated the diversity of these causes at the same time as reflecting on the difficulties in analysing them by referring simultaneously to 'the following forms of marginalisation' (p. 64) and to 'the four main causes of marginalisation' (p. 64):

- extreme poverty
- violence, abuse, neglect and exploitation
- discrimination and social exclusion
- catastrophic events, such as conflict and disaster.

(p. 64)

Each of these phenomena might be considered from particular perspectives to be causes and/or forms of marginalization; certainly individuals and groups experiencing them have little if any control over them and how they impact negatively on their lives and their life chances.

Indeed, this point resonates with a crucial insight articulated by Rose (2010) in his account of approaches to special needs education:

The fact that inclusion has been the centre of attention for such a prolonged period may well be an indication of the complexities and confusions surrounding this topic. A gradual appreciation of the necessity to change schools and education systems, rather than

focusing upon perceived deficits in individual children, has led to a reappraisal of previously established special education pathways. Medical models have given way to social interpretations of the needs of individuals and the communities in which they live and have encouraged researchers to take a broader perspective of the causes of marginalisation and the ways in which these may be addressed.

(p. 3)

On the one hand, this statement highlighted the need to move beyond deficit discourses related to individual members of marginalized groups in explaining the causes of marginalization. On the other hand, it also emphasized that there are significant and long-term effects of marginalization on individuals and groups alike.

From that perspective, it is easier and more straightforward to examine the effects of marginalization than it is to consider its conceptualizations and causes. This is explained partly by Kumar Nayak's and Berkes' (2010) assertion of the need for 'a more complex, multidimensional concept of marginalisation, not simply as a state of being but [also] as a process over time, impacting [on] social and economic conditions, political standing, and environmental health' (p. 553). While their focus was on human actions in a specific ecological environment, the broader point is that marginalization's multidimensionality makes the assignment of direct, one-to-one causes more difficult than the identification of continuing consequences.

With regard to those consequences, they have been variously articulated according to the concepts and contexts of marginalization from which they are held to derive. For instance, the authors of a study of African pastoralists whose livelihoods are under threat by industrialization argued that their marginalized status will potentially increase their 'levels of poverty, vulnerability and destitution' (Nassef, Anderson, & Hesse, 2009, p. iii). A more individualized consequence can be for members of marginalized communities to feel self-blame and worthlessness owing to believing that they are somehow responsible for the conditions of their marginalization, such as when women who are victims of domestic violence 'internalised the oppression of their partners and the dual abuse from services that failed them' (Walter-Brice, Cox, Priest, & Thompson, 2012, p. 503). Certainly, the consequences of marginalization are often lifelong for individuals and inter-generational for communities and for society as a whole (Barnes & Morris, 2008; Chapman, Dales, & Mackie, 2008), and sometimes they spill over into violence (Apter, 2008; Ylönen, 2009).

Marginalized communities

This book is concerned not only with marginalization but also with marginalized communities. This is partly because, as was noted above, the basis of sociocultural marginalization is largely communal rather than personal – the characteristics that generate the experiences of marginalization are held in common with other individuals in groups of varying sizes. This situation creates potential safety and support for those individuals; they are more likely to know others who undergo similar treatment to what they endure. At the same time, this communal dimension of marginalization tends to perpetuate the marginalization, because there are many more people against whom it can be directed even if a particular individual finds ways to overcome it (McKittrick, 2012).

Unsurprisingly, given this situation, marginalized communities are sometimes positioned as passive recipients of aid from wealthier groups that risk perpetuating their marginalization (Kinsella & Brehony, 2009; see also Jagannath, Phillips, & Shah, 2011) and as lacking the agency required to create their own identities that are independent of their marginalized status.

A different perspective, but nevertheless one predicated on an uneasy ambivalence, clusters around the often vexed relations between children from marginalized communities and formal schooling. For example, a four-year longitudinal study of two Indigenous Australian boys and their school attendance experiences (Bell-Booth, Staton, & Thorpe, in press) identified both individual 'child characteristics' and 'the critical factors...[of] social support, school practices, inclusion of family and positive expectation' as influencing those experiences. Given the inevitable power differential between an instantiated institution of the mainstream society on the one hand and the personal experiences of marginalized group members on the other, it is perhaps to be expected that strategies such as this one might be seen as shifting from individual empowerment to community integration to minority assimilation – a situation with which researchers must also grapple.

Yet some accounts of marginalized communities highlight their capacities for exercising agency, resistance and even transformation. For instance, Basu and Dutta (2008) described how commercial sex workers in India can be enlisted to enhance awareness of sexual health in a project '[b]ased on the culture-centered approach to health communication and subaltern studies theory' (p. 106), thereby demonstrating 'how communicative narratives of agency and resistance are enacted in

the marginalized lives of sex workers' (p. 106). From a different perspective, Mars (2009) posited individual university 'student entrepreneurs' as putative 'agents of organizational change and social transformation' (p. 339) and analysed their activities as 'sometimes leverag[ing] the market and market-like conditions of colleges and universities to create both organizational change and social transformation' (p. 339), although the extent to which these kinds of actions help to transform marginalized communities is less clear.

On the other hand, it is necessary to acknowledge at all times that marginalized communities are heterogeneous and contain individuals and groups with multiple and sometimes competing interests, so that one group's agency might be exercised at the cost of another group's interests. For example, a recent study of gendered identities and roles in the Western Cape in South Africa (Shefer, Crawford, Strebel, Simbayi, Dwadwa-Henda, Cloete, Kaufman, & Kalichman, 2008) articulated 'hostile resistance to changes in gender power relations' (p. 157) that were predicated traditionally on 'male dominance and female subservience' (p. 157). Equivalent ambivalence pertains to violent street gang subcultures in the United States and whether they should be understood as engaged in pathological behaviour and/or as manifesting resistance of mainstream hegemonic power (Brotherton, 2008).

Furthermore, it is vital to recall that agency, resistance and transformation are just as dynamic and just as difficult to define and conceptualize as marginalization is. For instance, drawing on an analysis of policy about enhancing capacity-building in marginalized areas in Wales, Fudge (2009) argued that some aspects of the policy revealed 'a "fixed" viewpoint of agency whereby the "capacity to act" will be facilitated by the output oriented framework of the programme' (p. 53). By contrast, Fudge contended that effective 'capacity building programs must acknowledge the importance of structures in addressing regeneration areas' (p. 53). Similarly, Ciotti (2009) asserted that the political agency of low-caste women in urban north India differs markedly from that in Western countries:

> it is often the supposedly 'oppressive' household boundaries rather than alternative outer spaces that, under a series of enabling circumstances, initiate women's political activities. Against this backdrop...Indian women activists' political agency is shaped by men's role[s], and how agency's relational nature is embedded in women's lifecycles, everyday practices and cultural expectations; in essence, in overall gendered agency.... [These practices] not only...challenge

the individualistic Western subject of political action, but they also complicate the idea of the resulting empowerment as a culturally constructed process whose understanding arises from the dialectics between insider and outsider values.

(p. 113)

At the same time, it is possible to identify, and potentially to disrupt, the binary opposites that structure much of the thinking of contemporary life (Midgley, Tyler, Danaher, & Mander, 2011) and whose logic underpins the centre–margin binary that makes possible the marginalized communities with whom this book is concerned. For instance, Jamaica Kincaid's semi-autobiographical novel *A Small Place* (1988) has been analysed as 'discursively dismantl[ing] the imaginative geographies of empire that cement binary oppositions, such as tourist/native and black/white' (Osagie & Buzinde, 2011, p. 210), thereby combining agency, resistance and possible transformation in creating new alternatives in postcolonial relations.

All of this is a timely reminder of the uneasy path to be negotiated by marginalized community members themselves and by the different groups – including education researchers – who work with them. This path weaves its way between recognizing the psychological and material challenges confronting such communities and avoiding removing from them the possibility of exercising agency. It also traverses the territory between affirming that community members have appropriate aspirations and interests and avoiding idealizing those aspirations and interests, which sometimes have the effect of significantly marginalizing selected members of their own communities.

Researching education with marginalized communities

Having synthesized selected scholarship about marginalization and marginalized communities, we turn now to examine current literature related to some of the challenges and opportunities attendant on researching education with those communities. We begin by considering specific issues associated with equivalent groups before focusing on education researchers.

There are potentially useful synergies between education researchers working with members of marginalized communities and the strategies deployed by other professionals to interact with the same communities (see, for instance, Pitts & Smith, 2007). For example, translators occupy potentially powerful positions when rendering the words of minority groups in the majority language (Jääskeläinen, 2007). Additionally,

some social service professionals working in non-profit organizations conceptualize their work as including policy advocacy with and on behalf of marginalized groups (DeSantis, 2010). Moreover, a central element of the preparation of social workers relates to exploring how social work can and should be beneficial to rather than marginalizing of clients (Gibbs & Stirling, 2013). Furthermore, nurses in New Zealand working with Indigenous Maori women often find it difficult to implement in practice the holistic approaches to health care that are needed (Wilson & Neville, 2008). Indeed, Toomey (2011) elicited eight distinct roles – four 'traditional' and four 'alternative' (p. 181) – performed by community development practitioners in interacting with marginalized communities, and warned that 'Some of these roles can serve to empower communities, while others can result in their disempowerment' (p. 181).

This same uncertainty underpinned Smeltzer's (2012) analysis of some of the dilemmas confronting researchers conducting research with social activists and sometimes involving themselves as combined researchers and activists. Smeltzer concluded that 'activist-oriented research can include a range of complementary hands-on activities, from front-line, direct-action social justice pursuits to less visible, though no less important "back office" support for local organizations and social movements' (p. 255).

Similarly, health researchers have been exhorted to develop practices that avoid replicating the marginalization experienced by particular groups of patients, such as using Indigenous Australian plays to distil healthcare issues that disrupt cultural barriers in providing such care (Matharu, 2009). In relation to this, two separate training programmes directed at the Ecuadorian public health workforce by international providers from Canada and Cuba were found to be innovative and effective, on which basis:

> educational efforts focused on the challenges of marginalization and the determinants of health require explicit attention not only to the knowledge, attitudes and skills of graduates but also [to] effectively engaging the health settings and systems that will reinforce the establishment and retention of capacity in low- and middle-income settings where this is most needed.
>
> (Parkes, Spiegel, Breilh, Cabarcas, Huish, & Yassi, 2009, p. 312)

From that perspective, Wilson and Neville (2009) summarized a set of issues that resonate strongly with education researchers:

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