Article

Qualitative data gathering challenges in a politically unstable rural environment: A Zimbabwean experience.

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Abstract

Gaining access to participants in rural, politically unstable settings demands authority and consent not only from the participants and immediate line managers, but also from other players with interests in the research sites. This paper discusses data gathering experiences and challenges encountered during fieldwork for a PhD amidst a politically volatile situation in Zimbabwe in mid-2008. The article highlights the challenges encountered, how the researcher overcame some of them, and was stymied by others. Specifically, political challenges related to gaining access to schools and participants, which created time constraints and frustrations, fears and anxieties for the researcher. Issues of poor topography and interview space also emerged as other challenges. The paper proposes that the snags and surprises, the feelings of frustration, fear and anger that go with researching participants in politically unstable settings should not stall the research process but instead, handled with flexibility and patience, and used as motivation to continue. The experiences not only enhance the researcher's own reflexivity and reflectivity but also provide insights into the human conditions and actions as viewed from multiple perspectives.

Keywords: qualitative data generation challenges; politically unstable environment; gaining site access, reflexivity, student teachers, South Africa, Zimbabwe

Introduction

This paper reports on challenges faced during fieldwork for a PhD comparative study. It explores and exposes the challenging qualitative field experiences and the unexpected twists and turns in the process of data generation with the aim of contributing to the methodological debates about qualitative data gathering in politically volatile environments. This emerges against the backdrop of an apparent absence of such knowledge. While these experiences were recorded as part of a daily reflective and reflexive journal during data generation, the paper draws on the comprehensive reflective and reflexive processes at the conclusion of the PhD data generation phase. Subsequently, considerations of the data gathering informed the methodology of the thesis. The paper begins with a brief background to the study and then tries to contextualize the challenges faced in Zimbabwe by discussing factors leading to the volatile situation in that country. The data generation procedure and literature are presented and the challenges described and discussed. Finally, the conclusions and lessons drawn out of the experiences are presented.

Background

The PhD study involved student teachers studying in two international institutional sites: Zimbabwe Open University (ZOU) in Zimbabwe and University of KwaZulu-Natal (UKZN) in South Africa. The study explored Professional Development experiences of unqualified practicing teachers in rural secondary schools. These teachers were enrolled in Initial Teacher Education Programmes in order to become qualified; a Post Graduate Diploma in Education (PGDE) in Zimbabwe and Post Graduate Certificate in Education (PGCE) in South Africa. Both programmes were offered through mixed mode/distance education delivery to professionally unqualified university graduate teachers. As the study sought subjective data on professional development experiences of teachers in rural schools, verbal interaction with participants was inevitable. Such interaction would enable participants to give subjective accounts of their professional development experiences and enhance exploration of those experiences and their conceptual meanings (Wheeldon & Faubert, 2009; Sin, 2010). Subsequently data generation involved fieldwork in rural schools where these teachers were practicing. This article however focuses specifically on the challenges of collecting data in a politically unstable Zimbabwean environment.

Fieldwork demands on the qualitative researcher are far greater than demands on researchers adopting other research strategies (Hurrell, 2005) and the challenges faced in the process become aggravated in a politically unstable environment. Zimbabwe held parliamentary and presidential elections on 29 March 2008. Results of the presidential component of the elections were contested and consequently not published until six weeks later. A subsequent decision (within the Zimbabwean Constitution) was made to hold presidential run-off elections on 27 June 2008. The months of May and June were therefore used by various political parties to prepare for these elections with campaign strategies ranging from peaceful in some areas to very violent in others. Violence in Zimbabwe during the period preceding the run-off elections was even condemned by the United Nations;

> The Security Council condemns the campaign of violence against the political opposition ahead of the second round of the Presidential elections scheduled for 27 June, which has resulted in the killing of scores of opposition activists and other Zimbabweans and the beating and displacement of thousands of people, including many women and children. (2008:1)

Also discussing political violence in Zimbabwe, *The Daily News* (2008:2) revealed that;
> At least 1 000 people have been displaced in Zaka and Gutu districts alone because of the 27 June presidential run-off election campaign violence in Masvingo province. Teachers and polling agents are the principal victims of the witch-hunt. The opposition claims that the government is on a 'retribution campaign' against opposition supporters including teachers and polling agents.

This political situation created volatility throughout the country and was worse in rural areas. It was during this campaigning period that I set out to gather data in rural secondary schools in Masvingo province.

Having my data gathering coincide with the presidential run-off elections was not a deliberate choice. The fieldwork had been planned long before the election turmoil. In addition to the volatile situation that was prevailing, Zimbabwe was going through a prolonged period of other serious economic and social challenges emanating from sky-rocketing inflation, shortages of fuel, water and electricity, absence of foreign currency, limited money supply from the banks, and absence of medicines in hospitals, basic commodities, services and food stuffs in shops. *Reporters Without Borders* had this to say;

> Zimbabwe's economy has been in crisis, on a steep downturn for nearly a decade with rampant inflation, 'de-industrialisation,' an estimated 90 per cent unemployment, severe shortages of fuel, electricity, food, and medical drugs, widespread hunger and at least 80 per cent of the population living below the poverty line (2008:1).

One Zimbabwean national quoted by *The Daily News* pointed out; "We need petrol for our vehicles, electricity and water, we need to access our cash from banks, we need foreign currency to pay fees for our children studying outside Zimbabwe." While these were not specific to the elections, they already were extraordinary conditions that were exacerbated by the unstable political situation.

Procedure

Data collection involved use of multiple data sources: document reviews, participant accounts, interviews and photo elicitation to elicit data from twelve purposively selected participants, six from each country. Fieldwork commenced with an initial visit to all schools to explain the purpose of study, allow people to know me and establish rapport and trust, (Lavallée, 2009) as well as to fix appointments for first interviews, and distribute cameras which participants would use to take photographs. The study adopted a three-interview series approach (Seidman, 1998). The first interview focused on the participants' education history and their experiences. This was to provide information to set the context of the participant's experience and connect them to events which answered the question 'how' they ended up enrolling on the programmes. The 'how' aspect would lead them into reconstructing details of their experiences within the context in which experiences occur.

This first interview was carried out with all participants as scheduled in the first week of May. The second interview consisted of Photo Elicitation (Warren, 2005) based on photographs taken by participants depicting who they are and their daily professional development experiences (practices). Cameras were collected during the first interview for processing in time for interview two, in which the researcher and participant engaged in critical and analytical dialogue based on

the photographs. Thus, the meanings of those photographs were explored during the second interview. The third interview fostered reflection on the meaning participants' experiences held for them including the connections between their life and their work as teachers and 'students,' and how these factors contributed to their professional development experiences. Participants were asked to explain their understandings of their professional development in a rural secondary school and what this means as individuals, as teachers and, as student teachers. They examined their present circumstances and experiences in detail within the context of the school in which these experiences occur.

In this context, given the three interview series approach adopted, time allocation overlooked unanticipated happenings. My tight research design had disregarded building in any contingency time for the Zimbabwean fieldwork**.** I overlooked the fact that things may go wrong and expected to have accomplished the fieldwork within six weeks which, unfortunately, was not possible**.** At the time of this study, I was not based in Zimbabwe but had travelled for purposes of fieldwork and so, was faced with travel and project deadlines. The UKZN Higher Degrees Ethics Review Committee granted ethical clearance for this research. Prior to going into the field, authority and consent had been granted by the Ministry of Education Sports and Culture at the national office, the Provincial Education Director at the provincial level, the school principals and the participants themselves by completing consent request forms. These participants were known to me as I had directly interacted with them as Lecturer in the Teacher Education Department in the ZOU before I left to undertake doctoral studies.

Literature Review

Relevant literature indicates challenges of qualitative fieldwork as revolving around three broad themes: accessing participants, time limitations and, the subsequent frustrations and fears. These themes have provided a framework for this paper. Oettler (2008) points out that one critical challenge in qualitative research is the sublation of multifaceted research experiences. Sublation combines three meanings: to preserve, to annul and to take to a higher level. In this context, notwithstanding the politically volatile environment, this may imply three issues: data generation experiences need to be saved and reflected upon (preserved); the unexpected twists and turns should not be allowed to dominate interview processes (annulment); and, fieldwork experiences should be taken to higher and more abstract levels of analysis to provide encouragement and motivation to continue.

Firstly in relation to gaining access, Ely, Anzul, Friedman, Garner and Steinmetz (1994) contend that researchers must not only obtain consent and support of original line managers, but also the support of other stakeholders who may be contextually closely connected to the field in which the researcher wants to do the fieldwork. Where such stakeholders resent research activities or researcher presence, they may find ways of sabotaging the entire research process and its activities. Under repressive regimes and societies, academics on research activities often are perceived as spies and sometimes taken hostage and/or abused (Hubbell, 2003). However, in politically volatile situations, consent of all the relevant line managers is always sought but issues of emerging political stakeholders are often overlooked. Further, the emergence of these new stakeholders en route may not be to sabotage the research process but to pursue political agendas. For example, Bailey (2007) suggests that while restrictions may be imposed in particular settings, they may also be spawned by and intended to meet political missions. The implication here is that the researcher should seek permission and speak to political leaders or other spokespersons if that is what it takes to facilitate entry into research sites in politically unstable settings. Thus, given

that gate-keeping and entry are a dominant theme for consideration of accessing participants, consultations with different levels of political hierarchies cannot be overlooked.

Further, access to most rural schools is often inhibited by poor topography and limited service provision. The majority of rural schools are generally not accessible by tarred road and others are not fully accessible by car, relying instead on foot access for part of the journey (Hurrell, 2005). In addition, most rural schools operate without standard infrastructure such as telephone and broadband internet (Mulkeen, 2006). Therefore, communication becomes extremely difficult with participants. These problems of access and communication become compounded in political situations. Again, researchers often make do with inadequate and or inappropriate interview space in these settings contrary to the standards of qualitative research, which require that there should be an interview setting which allows for privacy and trust (Oettler, 2008). On the other hand taking participants out of their contexts for interview purposes also contradicts qualitative data generation norms and practices and this may affect the interview content (Bailey, 2007). This is premised on the notion that qualitative researchers derive understanding from data gathering in the larger, complicated and multifaceted contexts in which the phenomena unfold, as Bailey metaphorically expresses "… better captured by a movie than by a photograph" (2007:3). Thus, apart from accessing the sites, issues of onsite interview space present further challenges.

Secondly, with regard to time limitations, qualitative data generation involves prolonged fieldwork and requires long-term engagement. The period may even be longer in politically un-free and unstable settings. Un-free in this context implies being constrained, confined and not able to move around freely. How long the fieldwork takes varies from study to study as Bailey (2007:36) clearly puts it "…however long you think your particular research will take is probably an underestimation of the time you will actually need." This view suggests that qualitative fieldwork does not entail fleeting contacts with informants but, admittedly long demanding hours where re-interviewing is the norm. Thus entering the field in a politically unstable setting is apparently a longer, more active process than many people may en-vision. With this in mind, the time restrictions created by the entry challenges may impact negatively on the quality and quantity of data captured (Ely, Anzul, et al. 1994; Hurrell, 2005).

Finally, frustrations, fears and anxieties in qualitative fieldwork are often spawned by diverse logistical issues of access, thus becoming extremely demanding on the researcher particularly in politically volatile environments. While the fieldwork can be systematic, flexible and enjoyable, it can also cause frustrations, fears and, anxieties by being "complicated, chaotic, emotional and dangerous" (Bailey, 2007: 37). The initial joy of choosing a topic and the rapture of the feeling that fieldwork could be an easily accomplished process disappears, because of some unanticipated problems (Ely, Anzul et al.1994). Bailey (2007) quoting Lawson (2000:135) succinctly describes challenges of qualitative fieldwork; "I felt, much as other field workers before me, unfamiliar with the social world under investigation and a resulting sense of edginess, uncertainty, discomfort and anxiety." Such feelings become exacerbated in a politically unstable environment. In those volatile circumstances, the likelihood is that the fears and prejudices may inhibit an unbiased approach. On the contrary, qualitative fieldwork demands that the researcher enters the research field with as much openness as possible (Britten, 2008).

However, overcoming fear and anxiety is often part of the researcher's motivation to continue with the data generation process. It is often this desire to continue in the face of all the dangers and politically related challenges that provide some source of courage. Bailey (2007) posits that researchers who are not only uncomfortable and frustrated, but also downright miserable in a research setting, have done wonderful research. From Oettler's (2008) perspective "failed" fieldwork and interviews do not obstruct the research process, instead they may accelerate it.

Thus, fieldwork and interviews which might qualify as "not good" at first glance might nevertheless contain "typical" or even "untypical" statements the researcher might be searching for notwithstanding any political or other context. Given these observations, qualitative researchers need not always avoid situations that give rise to feelings of frustration, anxiety and fear.

Further, in politically volatile environments, when entry is eventually gained participants are often un-free and afraid to engage in meaningful dialogue with the researcher. Hubbell (2003:10) clearly illustrates this point: "in partially free or un-free circumstances, participants share their experiences with extreme caution." Overcoming participants' uneasiness would require what Plummer (2001) and Britten (2008) refer to as empathetic and responsive gestures to facilitate participants' ease and willingness to talk, stimulate their motivation and provide them support and confidence. Such gestures may involve for instance, meeting any small expenses or providing snacks. In addition, the researcher might be faced with particularly difficult situations in listening to participants' political problems and experiences. Hence, there is a tendency of transforming the research interview into a therapeutic one (Bunio, 2008). Yet, some researchers point out that there is no evident rule to deal with issues of emotional engagement with participant dilemmas during fieldwork (Silverman, 2007). Thus, the researcher will have to face such problems but keep reminding themselves of the purpose of the fieldwork regardless of the participants' politically related dilemmas.

With above contextualization of the problems of qualitative fieldwork within the broader context, it is now appropriate to describe and discuss the fieldwork challenges experienced in a politically unstable environment in Zimbabwe.

Challenges and discussion

Accessing participants

Accessing schools and participants was not a problem in round one, but turned into a problem during the second round. New gatekeepers emerged, manning the roads, granting or denying permission to proceed and, demanding among others an additional "identification card," other than the legal national Identity card or driver's license. Consequently, permission for me to proceed was denied on three different occasions and on different routes within one week, thus inhibiting access to four participants. Given the prevailing political situation, any visitor was perceived by one political group as a spy for the other. These experiences resonate with those of other researchers that academics on fieldwork may be viewed as spies in un-free research settings (Hubbell, 2003; Britten, 2008). In this context, being considered a spy had serious consequences ranging from being abducted, abused and killed or being abused and kept hostage in political bases.

Several authors (Anzul et al. 1994; Hubbell, 2003; Britten, 2008; Bailey, 2007) have emphasized the importance of seeking authority and consent from all interested parties inclusive of political hierarchies before setting out into the field. Given these contextual problems, this meant having either to suspend interviews with the four inaccessible participants until the situation normalized and proceed to the accessible schools or, having to take some personal risks. The latter was more acceptable to me, albeit with these unanticipated problems starting to arise, I felt frustration, anger and panic. What was I ever going to do? Notwithstanding the fright and frustration, I continued to feel an urge to carry on and this gave me the impetus to keep trying and hoping. Overcoming fear and anxiety to proceed with the fieldwork amidst dangers and challenges is motivational (Bailey, 2007; Oettler, 2008).

At one of these roadblocks, I was sharply questioned regarding my destination, the object and substance of the visit, political affiliation and whether or not I was a spy. The question on affiliation was the most difficult as I was not sure of the groups' affiliation. The unexpected harassment was shocking and scary and one would not know their reaction to any responses. I felt highly uncomfortable and frightened. Other failed attempts of access were a result of the road blocked with rubble or a deserted school. Consequently, interviews had to proceed with the two accessible participants while figuring out how to access the other four participants.

Missing appointments for the second interview with four participants put the entire schedule off course. Three things needed to be done with urgency: first, informing participants about my plight, second, fixing new appointments for the next meeting and, third, getting the photographs to participants for their scrutiny and story development. Although we had exchanged contact numbers, getting through to them still remained a big challenge as telephone networks in Zimbabwe are not accessible everywhere. Easy cell-phone access is normal in town, but beyond a certain given radius, in order to pick up reception, subscribers would need to "go up a tree" to make or receive a call. Lack of telephone access was compounded by the prevailing electricity "load shedding" (power outage) in the country and this worsened the problems of communication. A number of authors concur that most rural settings are characterized by an absence of the general standard infrastructures such as the telephone and other communication facilities (Mulkeen, 2006; Taylor & Mulhall, 2006; HSRC 2005). For example, on one occasion access into the school was inhibited by lack of a bridge across a stream bordering the school and the community.

When these problems and obstacles prevented me from accessing my participants in the first place, I felt desperate as the urgency of conducting these interviews according to my schedule grew. What seemed to be a very long week went by and my feelings of desperation, continued to grow. After I failed to do interview two on the scheduled dates and communicate with participants, I decided to send text messages one after another to all the participants concerned, hoping that at some point they would get up onto their "tree" and be able to retrieve the messages. This did work, albeit one and a half weeks later. One important aspect that I had to address in my text messages was the critical ethical issue to do with their safety given the political circumstances, notwithstanding the signed consent forms. I further discussed this issue with each one of them when we eventually met for the second round of interviews. All four participants agreed that they wanted to continue. After their first responses, participants would either warn me not to travel, suggest a pick up point or sneak out of their school communities into town, where we could communicate.

I interviewed the four participants in the inaccessible schools at least once outside their schools. Given that an interview by its nature is a disruption of the participant's normal flow of events, even when it is at its most formal level, taking them out of their schools may have amplified the situation as interviews were held in unfamiliar venues far away from their school contexts. Again, this may have compounded status differences and power dynamics between interviewer and interviewee. On the other hand, in the context of this study, where some participants revealed that they were regarded as temporary teachers and looked down upon due to their professionally unqualified status, taking them to a neutral venue might actually have had a positive impact on the data gathering. Participants however, responded with extreme caution at the start of the interview probably trying to overcome these perceived issues of status and power or due to the broader political environment. Such behavior is in tandem with earlier findings by Hubbell (2003) who noted that participants operating in restricted environments become cautious of how and what they say. On the other hand interviewing participants out of their settings shapes interview

content (Bailey, 2007; Britten, 2008). Nevertheless, in this context, participants generally became engaged and trusting after the first 15 to 20 minutes. While pulling participants out of their settings for interview purposes was the only plausible option in the circumstances, this is contrary to the qualitative research standards and practices (Bailey, 2007; Britten, 2008; Oettler, 2008).

In the two easily accessible schools, floor space was limited. Teachers' offices were either inside classrooms and shared, or they were nonexistent. Where the offices were shared and located inside classrooms, the interviews were conducted spontaneously, and often with a low degree of commitment. Given that the offices were shared and, with the presence of another teacher with a class in the classroom, the interviewees were apparently not fully concentrating due to continuous disturbances. Further, noise levels created by the class often interfered with the quality of the audio recorder and made the interview setting unfavourable. Again, beyond acoustic challenges, participants' attention would sometimes be diverted to attend to the needs of learners and or colleagues. This again contradicts qualitative research requirements and standards where the interview setting must offer privacy (Bailey, 2007; Britten, 2008; Oettler, 2008). While these challenges were not specific to the political situation, they were contextual challenges that affected my fieldwork.

Further, given the political volatility, I had to make participants feel comfortable and safe during meetings and in sharing their experiences freely with me. This entailed having to supplement their expenses for travel, lunch and cell phone usage. Such gestures as viewed by Plummer (2001) and Britten (2008) demonstrate empathetic and responsive position of the researcher to foster participant's willingness, confidence and motivation to share their experiences. Supplementing their expenses seemingly made participants a little more settled and open with me to express their views and visions. I saw this gesture as something that enhanced participant's commitment to my fieldwork. The participants apparently viewed my data gathering process as priority. Given their other numerous constraints emanating from the political environment, it was significant that they afforded the time and effort. However, many explanations could be given in answer to the question 'why the commitment?' For example, the payment issue, the neutral venue for interviews or the lecturer-student relationship that existed before I embarked on the PhD study.

Time constraints

I had wanted my interviews to be conducted within two weeks of each other at the school sites to account for idiosyncratic days and confirm internal consistency (Seidman, 1998) of what participants would say. Given that I had just about two weeks to hold two interviews with each of these participants and the mounting intensity of the political activity that kind of spacing became impossible. Consequently, interviews were conducted within one week of each other, contrary to the schedule which would have provided some adequate relevant context to the information sought from each particular interview and minimized the impact of context interference. Further, within this new constrained operational timeframe, follow up interviews with some participants were no longer possible. Again as participants used public transport whose timetables were neither known nor fixed, time for interviews often was curtailed, leaving less time available for eliciting more detailed data. Operating within limited time may have had an impact on how much data were actually elicited from these participants. Time constraints often have a negative impact on fieldwork in general and the quality and quantity of elicited data in particular (Plummer, 2001; Hurrell, 2005).

Frustrations, fears and anxieties

All these challenges gave rise to frustrations, fears and anxieties. First, I had the feeling that both the researcher and researched carried their own fears and prejudices into the interview which likely impacted on the whole interviewing process, despite the need for researcher open mindedness as demanded by the qualitative fieldwork (Bruce, 2007; Britten, 2008). The fact that I had to move around the dis-embedded environments (Oettler, 2008) meant a somewhat constant, subliminal threat. As I drove out into the field each day, particularly in the direction where I had been harassed, I was uncomfortably conscious of danger.

Second, throughout the interviews, I had to battle with the problem of trying to avoid getting deeply engaged and moved by the participants' dilemmas from listening to their experiences of political violence, torture and abuse. Silverman (2007) and Bunio (2008) acknowledge the existence of such dilemmas but hasten to advise that the researcher should always keep in mind personal motives for conducting the specific fieldwork. Thus, maintaining some emotional distance may help create space for critical analysis and at the same time guards against converting the research interview into a therapeutic session.

Third, in making researcher diary entries after fieldwork, I would battle with basic questions such as, "Is data from this interview sufficient?," "what constitutes sufficient data?," (Bruce, 2007) "what constitutes a good interview?," "was this a good interview?," and "what would I have done differently?" Circumstances shaping data gathering were in constant flux and this tended to shape my reflections on these interviews and most of the time I felt that the interviews were not good enough. I felt that the interview data lacked detail. However, as literature has indicated (Silverman, 2007; Oettler, 2008; Bunio, 2008) such feelings should not deter the research but instead provide fuel for its progress. Thus, no matter how short or implausible interview accounts may be, they may nevertheless contain some core discursive fragments. Interview accounts need to be viewed in context, in this instance the political atmosphere or the interview situation needs to be given due consideration.

Fourth, the on-going evaluation of the data generation experiences was affected by my perceptions of these extraordinary personal encounters and situations that made me uncomfortable and created strong sentiments of fear. Sometimes, I had to wait without certainty for a telephone call or text message for days. Given the anxieties, the frustrations, the feelings of fear and the un-certainty accompanying the entire fieldwork, I was faced with a difficult decision-making situation at one point whether to continue or abandon the field work altogether. I needed some guidance from my promoter in South Africa but with telecommunication services beyond the national borders virtually impossible and, in the absence of accessible internet facility I could not access any guidance.

Conclusions

From this research experience I realize that data gathering in a politically volatile situation demands a clear understanding of the environment in which the field work will be undertaken and, adequate preparation for challenges before engaging in any field work. Gaining access in a politically unstable environment requires consent and authority from a wider spectrum of gatekeepers inclusive of political hierarchies before going out into the field, something which never occurred to me. I have learnt that it is remarkable but true - that the process of entering the field never quite unfolds and ends as the researcher expects it. However, the researcher needs not be too self-critical as one of the delightful things about qualitative research is that one learns to accept the researcher as a unique and defective instrument. Consequently, each study will be a product of that particular instrument, clearly different from any other.

My experiences of conducting fieldwork were both challenging and rewarding. They demanded flexibility, patience and unhurried decisions. The surprises, the fears and frustrations, anger and anxieties should not impede the research activity, but viewed as impetus to proceed. I felt enriched by both my experiences and my participants through their stories and this enhanced my own reflexivity and reflectivity and, provided insights into conditions and actions of these participants as viewed from multiple perspectives. Being reflexive in this sense implies engagement in on-going process of reflecting ideas and experiences back on oneself as an explicit acknowledgement of one's locatedness in the research (Cole & Knowels, 2001). Despite fear and anxiety, at times I ventured into dead ends, but only to make a U-turn at some point and return home. I indeed encountered several challenging situations and some almost impossible tests.

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