Chapter 4

Methodology: Researching the community through emotions of change

The aim of the study is to describe, explain and theorise the restructuring of Jewish community schools in Johannesburg. It is argued here that economic, social and ideological forces have interacted in the process and have generated a conflicting set of discourses. The first is the discourse of new managerialism and marketisation, while the second is the discourse of community and religious resurgence. The methodology of this thesis is concerned with tracing the interaction between the above processes and assessing how they influenced the trajectory of the reform. This is explored by drawing out different stakeholders' views and the meanings they have attached to the changes, as well as by recalling their experiences and understandings *vis-à-vis* the restructuring process. Stakeholders' perceptions shed light on the three main research questions, namely: Why did the restructuring happen, how, and with what impact?

Research methodology

Researching a complex and current change process in real time – such as the restructuring of the Jewish community schools – presents many challenges and compromises. In this regard, a qualitative approach has been found to be well suited as it follows the process and explores the diversified perceptions, understandings, feelings and experiences of the different stakeholders. This is because *'qualitative researchers study things in their natural settings, attempting to make sense, or interpret, phenomena in terms of meanings people bring to them'* (Denzin & Lincolin, 1998:3). Denzin and Lincolin view the researcher as a *bricoleur* – a Jack-of-all-trades who uses any method, strategies or empirical materials that are available in the context to produce the *bricolage,* that is, a solution to the puzzle. In a qualitative case study, the researcher is the primary instrument for data collection, analysis and interpretation (Miles & Huberman, 1994).

I chose to use a qualitative case study research design for the following reasons: first, epistemologically, I accepted reality to be a subjective concept that needed to be interpreted rather than measured. Second, qualitative research encourages both inductive and deductive reasoning (Gilbert, 2001; Frankel & Devers, 2000). It therefore allowed me to test the concepts of new managerialism against the

empirical data while accommodating the possibility that other theories might be at play. Third, as the field work for the study took place during a time of rapid changes and unforeseen developments, the flexibility of the design allowed me to follow a process, yet to be open to any surprises or sudden changes and to use the information gathered in the earlier research stages to alter subsequent stages; in other words, to "move with the goalposts" (Paechter, 2000). Fourth, a qualitative case study recognises different contexts and is recommended when it is impossible to separate a phenomenon from other variables in its context (Merrian, 1988). Fifth, a qualitative case study is guided by the ethic to remain loyal or true to the phenomena under investigation and is not confined to any particular set of methodological techniques or principles (Altheide & Johnson, 1998). Methodology thus *serves* rather than leads the research. And lastly, this research sought to account for the different stakeholders' experiences and to pose questions regarding meanings and interpretations. It was therefore important to have a flexible design that could accommodate this diversity. Moreover, qualitative research recognises that human beings have agency, that is, they react to situations including those of being researchers or research subjects. They therefore construct interpretations and meanings for the events in which they participate (Griffiths, 1998). In this sense the research makes an interpretation of the interpretation, which is referred to by Giddens (1984) as *double hermeneutics*. This means that any explanation of social life depends on both kinds of knowledge: knowledge of how people interpret their own experiences; and knowledge that researchers use to analyse and explain this behaviour.

The scope of the research

The data for this research was collected over a period of two years from 2001 to 2003. It began in April 2001 when a CEO was contracted to restructure the Jewish community schools and to solve their financial difficulties, and it ended in April 2003 after the 27th National Conference of the South African Board of Jewish Education (the Board), with the election of new honorary officers. However, in the year that followed – during which I was analysing the data and writing my dissertation – certain events and processes had reached their conclusion, thereby confirming or refuting some of the research findings. These subsequent events are therefore referred to in the dissertation.

I initially planned to limit the scope of the research, confining my purposive sample to the three primary schools that are controlled by the Board. I chose this sample because of my greater familiarity with this context and my belief that primary schools are less balkanised and therefore less complicated for research purposes. To a certain extent I stayed with this purposive sample, but my attention shifted to other sites to explore significant incidents or actions that took place at the high schools, the Board or in the broader community. I started to think of my research in terms of taking a panoramic view of the whole process, while zooming in to highlight certain events, individuals or processes. While researching an evolving process I did not know in advance which events would become significant. As a result I began by homing in on every occurrence. As the restructuring process developed, however, I was able to identify the more significant events and to focus on those.

Research participants

My research participants were the stakeholders in the Johannesburg Jewish community schools. Stakeholders' research supports my epistemological belief that there are many ways to view a phenomenon. However, it is also limited. In a stakeholders' research, the researcher ends up knowing less than any of the informants about their unique experiences, but the researcher does gain a unique overview of the total experience (Wallace & Pocklington, 2002). Thus, stakeholder-based research compromises depth for breadth.

Six main stakeholder groups were identified for the purpose of this study. These were teachers, parents, managers, Board members, community leaders and an additional group referred to as "other stakeholders". The latter group included various informants, from both inside and outside the community, who had some knowledge or interest in the restructuring of the Jewish community schools. The groups were not always distinct. A teacher could also be a parent; a Board member could be a community leader or a parent, etc.

Some groups included subgroups. For example, there were traditionally three separate teacher subgroups in the primary schools, namely, secular teachers, Hebrew teachers and Jewish Studies teachers. The restructuring affected each group in a different way.

The manager group was small and easily identifiable. I therefore included in that stakeholder group the principals, their deputies, the vice-principals and coordinators at Board level.

The Board included those members of the executive committee who had voting power.[1] They were often referred to as lay leaders or honorary officers. They consisted of those elected at each conference as well as life members. There were about 35 honorary officers at the time of the restructuring. Within this group, there was a distinctive informal subgroup, the management committee (Manco), comprising the chairperson, vice-chairperson, the treasurer and the CEO – the only professional. Table 1 describes the six stakeholder groups in table form:

Table 1 – Main stakeholder groups

Stakeholders Groups		Members
Primary school teachers	Secular and remedial	Any informant who teaches secular subjects (including managers).
	Hebrew	Any informant who teaches Hebrew (including managers).
	Jewish Studies	Any informant who teaches Jewish Studies (including managers).
Management		Principals (junior, primary and high schools), deputies, vice-principals, coordinators (system level).
Board	Honorary officers	Any informant who has a voting right on the Board (life members included).
	Manco	Management committee within the Board comprising the CEO, the chairperson, the vice-chairperson and treasurer.
Community leaders		Any informant who has/had a formal leadership role in the community.
Parents		Includes PTA members and any informant who has children at the schools.
Other stakeholders		Any informant who had knowledge about the restructuring or certain aspects of it, but was not included in the other categories. This category included rabbis, previous directors, high school teachers, scholars, consultants, social workers, donors, employee forum representatives, members of other schools or organisations in South Africa, and *shlichim* (emissaries) that is, informants sent from Israel to do a specific job, such as youth movement leaders or the Israeli Task Force.

A combination of purposive or judgemental sampling as well as snowball sampling was used to choose my informants. In purposive or judgemental sampling *'the researcher applies his/her experience and judgement to select cases which are representative or typical'* (Fogelman, 2002:101). I had to rely on my knowledge of the system in order to approach stakeholders who I assumed represented diverse views. Once I had approached these individuals and had interviewed them I asked

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[1] See Chapter 3 for a detailed description.

161

them to direct me to others with similar or different opinions, thus using a snowball sampling approach. To interview teachers, I identified a teacher with a specific role at each school as my first informant and then used snowball sampling to identify other teachers. I applied a similar reasoning to identify parents who had knowledge of the restructuring. I approached active parents with a specific role in the Parents'– Teachers' Association (PTA), and thereafter used snowball sampling to identify active parents with diverse views. I also tended to follow up on individuals who went from being passive stakeholders to active stakeholders. This included, for example, a newly promoted manager or a parent who became involved in the PTA in a significant way because of the restructuring. I soon accumulated a great number of names – in fact, more than I could follow up on. The choices and decisions with whom to talk to, and when, were made as the research progressed. Seventy-two (72) stakeholders were interviewed; few had more than one interview.

While I attempted to give voice to diverse stakeholders, a few perspectives are missing, such as the teachers and the administrators who were retrenched; this research focused on stakeholders who stayed throughout the life of the field study. The voices of the newly promoted administrators who took over the Board after the professional members were dismissed is also missing, since these people were reluctant to be interviewed. The school secretaries, who could have provided an interesting perspective, were excluded initially through oversight on my behalf, and later due to the need to narrow the scope of the research. The learners' voice is also missing, even though it is to some extent represented in the viewpoints of parents and teachers.

At the outset I decided not to approach pupils, but many of my interviewees repeatedly urged me to do so. I eventually conceded on an experimental basis and asked a mother to facilitate the process by suggesting that her child choose three friends for a small focus group. Parental permission was obtained. The children were 12–13 years old and in their last year of primary school, which was my purposive sample. This group was used to explore the type of information that could be gathered from pupils in order to decide whether they should constitute a separate group of stakeholders. While the data was most interesting and I was impressed with the depth of some of their remarks, I realised that the pupils often referred to events that had happened a few years before, such as the departure of a principal, as part of the

restructuring. I therefore decided not to interview learners and to limit the research to the six stakeholder groups mentioned above.

When quoting a stakeholder, I usually excluded attributes such as character description, religious affiliation, age, sex or whether the person was recently promoted. There was no attempt to assign causality or explanation of behaviour by the group that the interviewees belong to. I thought that it would be presumptuous to assume that selected biographical details can explain behaviour. An overlap between roles also existed; for example, one could not tell if a teacher's opinion related to the fact that she was a teacher, a mother, or because she knew a certain Board member.

Method for attaining access

The way in which I was to gain access had troubled me from the inception of the research. I began my PhD programme before the Jewish community schools' restructuring and with the support of the director at that time. I was interested in the new policy context in South Africa and how it had impacted on Jewish community schools as independent schools. With this vague idea I began by looking at various government policies, searching for a topic worthy of research. The restructuring of the schools, the appointment of a new CEO and my subsequent retrenchment provided me with an exciting research focus. When I notified the new CEO that I had chosen the restructuring as the focus of my PhD he was encouraging and even agreed to be interviewed. I assumed, in hindsight, that this was a tactic on his behalf to get me to leave as soon as possible and to accept a "voluntary" retrenchment. The chairman of the Board gave me the same reassurance. A few months later I sent both the CEO and the chairman formal letters requesting an interview and access to data. These were, however, refused. The CEO was *'not comfortable in taking any risk with an external party'*.[2] The chairman *'was not in a position to furnish [me] with the information, nor to grant [me] the interview [I] had requested'*.[3] This was not unexpected. Problems with access are common when one researches a process that is both controversial and contested (Walford, 1994). Their refusals made me even more determined to explore what was going on.

I began by approaching individual teachers and other stakeholders who were distant from the centre and had little contact with the CEO or the chairman. After a

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[2] Letter from the CEO, 11 April 2002.
[3] Letter from the chairman, 15 April 2002.

number of interviews – and as I became more confident and encouraged by the positive response to my research – I approached those individuals who worked closely with and/or supported the CEO. Most granted me interviews. In addition, I followed the CEO to every public meeting and openly took minutes of the proceedings. I was never refused entry. However, I could not observe the schools, classrooms or the staff rooms during working hours and I could not use surveys or questionnaires. I had to approach the stakeholders on an individual basis. Eighty-one (81) stakeholders were contacted and only nine declined for various reasons. Significantly, of those who avoided interviews, the majority were involved with the financial aspects of the restructuring, such as bankers and donors as well as the newly promoted administrators on the Board.

Several factors served to facilitate access. The most important one was my personal relationship with many stakeholders, some of whom I knew through my long association with the schools and some through my connections in the community. Since I was previously in a prominent position, many stakeholders knew my name even if they did not know me personally. This undoubtedly facilitated my access to information. I also agree with feminist researchers who claim that being a woman helps to facilitate access (Deem, 1994a). Deem maintains that a woman researcher is seen to be less threatening than a male researcher because in a sexist society she will be regarded as being "harmless". Moreover, one's gender helps when it comes to researching other women who feel comfortable to chat to and open up to another female.

My access to the field study was further facilitated by my sense of entitlement as a member of the community to research the restructuring of the community schools, and by my conviction that I, as well as the rest of the community, had the right to know what was going on. Initially, I attended annual general meetings (AGMs) and PTA meetings as a parent, even though I was more interested in the events as a researcher. As I continued with my inquiry and was able to clarify my research aims, I relinquished my role as a parent and took full responsibility as a researcher by asking permission from the chairpersons of the meetings to observe and take minutes. Permission was always granted, but only one chairperson actually negotiated with the other participants first before granting such permission. Often the chairperson did not introduce me or even think it necessary for me to explain the purpose of my research. My role as a researcher therefore continued to be hidden

164

from the other participants. Slowly, my presence became habitual to those who noticed me. Even the CEO, who was not "comfortable" with the research, accepted my presence and sometimes came to chat to me after the meetings. Many school members and parents probably found my presence to be a natural occurrence, based on my long association with the institution. They often confused my past position as a parent/teacher/Board member, and my research interest. I was often asked whether I was still researching, if my children were still at the school or if I was still involved with the Board. I was usually not concerned with the accuracy of the perceptions and would say something noncommittal like *'yes, I am like part of the furniture ...'.* It is therefore safe to say that my access was facilitated by my feeling of entitlement to be there as well as by the stakeholders' acceptance of this entitlement. At the same time I had to guard against getting too involved. I was careful not to interfere or express an opinion and preferred rather to mingle with the crowd, listening and making casual conversation.

Most of the community leaders and managers that I approached were generous with their time. This supports the findings of Walford (1994) that researching the powerful is easier than expected, especially in local communities. Some stakeholders were at first reluctant to be interviewed. I managed, however, to get those interviews through sheer insistence and by not taking "no" for an answer. In a way, gaining access and obtaining information required a personality change on my behalf. From being a somewhat aloof and rather reserved person, I started telephoning people again and again, walking alone (sometimes uninvited) into meetings, networking, chatting and making casual conversation. I support Walford's (ibid) observation that the researcher needs to adopt many characteristics of a social climber, especially when researching "up" (researching those in power). My transformation was quite noticeable and those close to me often teased me about it.

Data collection plan
The research was managed in seven phases (see Table 2), some of which were conducted concurrently:

Table 2 – **Research schedule**

Phase	Research Activity	Time Frame
Pre-research phase	Searching for a theoretical framework and submitting a research proposal	February 2001–March 2002
Phase 1	Observation	April 2001–March 2003
Phase 2	Documentation analysis	April 2001–ongoing
Phase 3	First round of interviews	February 2002–December 2002
Phase 4	Coding and analysing data (using Atlas.ti)	November 2002–February 2003
Phase 5	Second round of interviews with selected stakeholders on selected topics	January 2003–April 2003
Phase 6	Re-reading the interviews and re-coding data (using Atlas.ti)	April 2003–May 2003
Phase 7	Writing up the research report	April 2003–March 2004

Pre-research phase – This comprised refining the theoretical framework in order to identify sets of propositions to be used for the interview guide and as the organisational basis for data analysis (see Appendix 1). However, a deeper understanding of the theoretical framework was achieved only at a later stage when I analysed the data and began to write the research report.

Phase 1 – Observation was on-going, whether as a participant when I was still working at the Board, as a parent attending my son's school AGM or PTA meetings, as a community member attending public meetings and conferences, or as a researcher attending various public and private meetings. My observations were recorded in my journal.

Phase 2 – Before beginning the interviews I read extensively about previous restructuring efforts in order to familiarise myself with the history of the institution. This reading, together with my personal experience, formed the basis of engagement with the interviewees. Document analysis continued throughout the research phases as data became available.

Phase 3 – The aim of the first round of interviews was to elicit interviewees' perceptions with regard to their roles before and after the restructuring, their relationships with colleagues and other stakeholders, and their understanding of why the restructuring had occurred, how it had evolved and with what impact. While the literature recommends an on-going analysis of the data in order to inform subsequent interviews, this was often impractical for two reasons. First, the number of interviews and their length delayed the transcription process and subsequently the analysis. Second, as I was emotionally involved in the research it was difficult for me to detach

myself from the data. I realised that I first needed to focus and feel the events as they occurred and to leave the analysis for a later stage. A similar approach to data analysis was taken by Thody (1997) who maintains that delaying analysis allowed her to be non-judgemental and detached.

Phase 4 – This phase constituted my first comprehensive data analysis. The data was generated from my personal account, documents and interviews. It was gathered and coded with the help of Atlas.ti – computer-assisted qualitative data analysis software. This analysis allowed me to form a theoretical understanding of the Jewish community schools' restructuring.

Phase 5 – On the basis of the findings, a second round of interviews was requested with selected respondents to assess their awareness of specific aspects of the restructuring, their willingness or ability to participate in the process, and the meaning they attached to their experiences. This gave some longitudinal perspective to the research. Sharing the emerging analysis with the participants incorporated "member check" into the research methodology and thus increased its credibility (see section on validity in this chapter).

Phase 6 – This phase comprised a second analysis of the findings. As my understanding of the process increased I began to theorise my findings and was able to move from the "small picture" to the "big picture". I started to read extensively on new emerging themes such as globalisation, identity and Jewish identity, secular and religious Zionism, the Jewish community in South Africa and its approach to the "others", fundamentalism, etc. This was in contrast to the first few phases when my reading focused mainly on new managerialism and on the history of Jewish education in South Africa.

Phase 7 – This involved writing the research report. This phase was more challenging and lengthy than imagined, and it progressed through a dialogue with the document and data analysis, as described in Phase 6.

Data collection techniques

Interviews, casual conversations, document analysis, personal accounts and observations were the main techniques used to investigate the restructuring of the Jewish community schools.

Interviews

The research relied heavily on interviews. By conducting the interviews I was immersed in the process of the schools' restructuring and was exposed to the meanings that stakeholders attached to these changes. I conducted mainly in-depth, semi-structured interviews. Slightly different schedules were used for different stakeholder groups in order to explore their specific areas of understanding and knowledge, but the gist was the same throughout (see Appendix 2). Secondary analysis of archived interviews was also used.[4]

The interviews lasted anywhere between 45 minutes to two-and-a-half hours each, at a place and time chosen by the interviewees, mostly at their homes. Confidentiality and anonymity were guaranteed. The interviews were preceded by telephone calls to colleagues and/or by formal letters (see Appendix 3), depending on my relationship with the respondent. The interviews were recorded, transcribed verbatim and analysed.

The first question, which was aimed at establishing rapport, was about the interviewee's role or involvement in the schools. Thereafter, I proceeded with four sets of questions. The first set aimed at eliciting the interviewee's knowledge and understanding of the restructuring – why did it occur, how did he/she hear about it, what was his/her involvement and what were the perceived outcomes to date? With community leaders, honorary officers and Manco members I also tried to draw out the short- and long-term goals of the restructuring, and to what extent they were aware of what was happening at the schools. The second set of questions were aimed at exploring the interviewee's feelings about the restructuring and the process – what were his/her expectations and concerns, how did he/she feel about the changes made and what did he/she consider to be the major challenges facing the schools? The third set of questions investigated the impact of the restructuring on the interviewee, how it impacted on his/her work, motivation, and status within the schools, and how it impacted on the schools' ethos, image, finances, religious base, community services, pupils, academic achievements and curriculum. The fourth set of questions dealt with the impact of the restructuring on the relationship between the interviewee and his/her colleagues as well as on his/her relationship with other stakeholder groups. The

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[4] Amongst these were interviews conducted by David Saks in 1998 for Gideon Shimoni's latest book, *Community and Conscience* (2003).

interviewee was finally asked to direct me to other informants within his/her stakeholder group that either agreed or disagreed with his/her views.

The questions were slightly altered as time went on. For example, the question: *'How did you hear about the restructuring?'* became irrelevant after I established that most people had heard of the restructuring via rumours. When new developments took place, the stakeholders – especially at school level – focused on the issue of the moment and were not always sure what was included in the notion of "restructuring". Towards the end of the process, therefore, I omitted some questions and included new ones such as: *'What has changed in the last two years?'* or, *'If I were to walk into the schools now, what would I see that is different from what I saw two years ago?'*.

Prompts were used until the topics were exhausted. As I was aware that there is a gap between what people "do" and what people "say" (Hodder, 1998), I tended to follow many of the interviewees' statements with a request for an example or further explanation.

In the second round of interviews I targeted stakeholders who could give me specific information on evolving issues, and the resulting discussion usually focused on those issues. I conducted some repeat interviews and also targeted stakeholders who became significant players in the course of the restructuring. I ended the interview process by targeting scholars and community leaders who could reflect with me on the theoretical implications of the restructuring, with the aim of confirming or negating emerging themes.

Timing for the conducting of interviews was crucial. I had to have an almost tacit knowledge of when was the best time to approach stakeholders in order to get the most cooperation and openness. I realised that my respondents were going through various emotional stages as they were adapting to the changes (Marshak, 1996). They experienced different emotional reactions such as resistance, loss, grief and acceptance, and I wanted to record the associated feelings of each stage. I avoided interviewing stakeholders about an event as it happened or while it was still in the planning stage since those who were "in the know" were overly sensitive regarding confidentiality of information. Those who were excluded from the planning of an event were fed by rumours and fear. Moreover, there was the danger that by asking about an event that had not yet become common knowledge, I would be party to the spreading of these rumours and fears. Those who were instrumental in initiating the

restructuring were more willing to speak with me at the end of the research span, when it was felt that they were achieving their goals. It was then that I managed to secure some interviews which were denied to me a year earlier. Teachers, on the other hand, were eager to speak at the beginning stages of the restructuring, but became tired, scared and apathetic a year later.

In order to keep the dialogue between the stakeholder groups focused on the same topics, members of each group were interviewed at different stages throughout the life of the fieldwork. Table 3 indicates this spread and the number of interviewees in each category. Note that the timing of the interview matched the school calendar. The largest number of interviews in one month was during the July school holidays, when teachers are known to be more relaxed and have more time. There were few interviews in September, a month packed with Jewish festivals, but the number picked up again during the October school break.

Table 3 – **In-depth semi-structured interviews – schedule**

	Honorary officers (Board)	Other stakeholders	Community leaders	Managers	Teachers	Parents	Number of Interviews
2002							
February		2[5]					2
March			1				1
April				1	3	[1][6]	4
May			1	3	3	[2]	7
June				2	2		4
July	3	2	1	2	5	[4]	13
August	4	1		1	2	1 [4]	9
September		1					1
October	1	2	1	2	1	1	7
November		1			1	2 [1]	4
December		1					1
2003							
January			1		3	1 [2]	4
February		1			1	1	3
March	1	2		2	1		6
April		3	1				4
May		1	1				2
	9	17	7	13	22	6 [13]	72

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[5] These were unstructured interviews as the interviewees were leaving the country before my research instruments were ready. When I read the transcriptions of these interviews some months later, however, I realised that they contained information that I was not able to absorb at that time, but that had become useful for the research.

[6] The brackets signify parents who have been categorised in another stakeholder group, such as honorary officers, teachers, etc.

The interviews were often followed by a telephone conversation, thanking the interviewees for their time and cooperation. I occasionally used these conversations to raise some issues which I thought I may have missed during the interviews. We sometimes even ended up discussing the restructuring at a coffee bar. I often phoned the interviewees again when the transcriptions were ready and used this opportunity for another casual conversation. The conversations were then recorded in my journal and provided me with additional data and validity checks.

The restructuring of the Jewish community schools carried much emotional tension, not only for me but also for most of my interviewees. Many stakeholders had a great need to share and to speak about their experiences and interpretations of the process. It was not uncommon for agitated informants to start recounting their stories before I had a chance to set the tape-recorder or to ask the first question. At the beginning I tried to follow the schedule. However, I soon realised that these spontaneous outbursts were a good indication of what was foreground for my interviewees. In these cases the interviews became more of a conversation led by the interviewees but not controlled by them, as I was mostly able to steer them in the direction of my schedule when necessary.

The freedom to speak in a context that was becoming increasingly devoid of trust and free debate was welcomed by many interviewees. Some would even telephoned me after the interview to tell me that they had *'something important for my research'*, and would then proceed to describe what had happened at school that day. To some stakeholders the interviews were "therapeutic opportunities"[7] in which they were given a space to reconstruct and deal with their experiences. In these cases my role as a researcher almost bordered on that of a therapist, even though I have limited experience in that regard. The following excerpt demonstrates this point:

Interviewee:	But he [the CEO] didn't acknowledge me in any way – nothing.
CH:	*How does that make you feel?*
Interviewee:	Angry. I do feel angry.
CH:	*Ya.*
Interviewee:	It's nice to talk about it – there's nobody to talk to about it … It's lonely and you're isolated and there isn't really anybody to share anything with.[8]

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[7] See Birch and Miller (2000).
[8] Manager, 11 July 2002. [Document 29:46 (1396:1412). Codes: Researcher - nice to talk about it].

171

In other instances interviewees expressed gratitude for the opportunity to discuss their experiences without being contradicted or silenced:

> That's why I quite enjoy … talking to you. [This is] not a conversation I can have with just anybody. You know, it's not something everybody can relate to – I will lose them somewhere along [the way] …[9].

I was not always a willing "therapist" and I often regarded the interview as an "emotional labour" in which I had to conceal my own emotions and hurt in order to allow others to express theirs (Hochschild, 1983). Furthermore, some of the interviewees' anger was directed at the previous management, which was blamed for the corrupt handling of funds. Even though most respondents did not consider me to have been part of management because of my academic rather than administrative function, I saw myself as part of that group and felt that the criticism was directed towards myself. In the early interview stages I had a need to argue the point. Later on I started to explore this perception and secured good research data. Moreover, I was often swept up by the emotions that had engulfed the whole community, such as when the intention to close the school where my son was studying became a possibility. It must be understood that the restructuring of the Jewish community schools was the main topic of conversation in many homes and at social gatherings for almost two years. It was extremely difficult for me not to express an opinion, especially among friends and family. In order not to "get trapped" into debate I began using traditional interviewing techniques even in social encounters by denying any knowledge of the subject or by saying that *'I am no longer there'*. With time I became more knowledgeable of the process than most of my interviewees, yet it was important to give them the feeling that there were still things they could tell me. When the study progressed and the bigger picture became clearer to me, I was able to apply a reflexive approach and to reflect on the different worldviews that we all brought into the process. However, at the last phase of the research, when I was able to distance myself and made *'the familiar strange and the strange familiar'* (Comaroff & Comaroff, 1992:6), I felt that I no longer belonged in the community. This alienation carried its own pain and emotions.

Not all interviewees fell into the category described above. Some interviewees, mostly at lay leadership level, were very guarded and disclosed as little information as possible. Others, again at leadership level, elegantly avoided any

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[9] Parent, 31 January 2003. [Document 63:68 (1821:1827). Codes: Researcher - nice to talk about it].

controversial questions or even gave me misleading information which I was, however, able to discredit as I had enough corroborating data. Some of the lay leaders were able to control the interview process by discussing or dismissing certain topics. In some cases, especially when interviewing those with whom I disagreed, I spent valuable time establishing rapport. Consequently, important questions were neglected and vague or misleading answers were not challenged.

Interviews have their limitations. Apple (1993) maintains that much is still concealed in interviews since one always tries to put one's best foot forward. Moreover, *'no person completely understands either the meanings and causes of her or his actions or the underlying and often unconscious (and perhaps less laudatory) reasons certain paths are taken and not others'* (ibid:164). It is therefore important to corroborate the data with other means, as the following sections will demonstrate.

Casual conversations

I conducted frequent casual conversations with stakeholders, using a similar approach to that used in the interviews. I went through many cups of coffee and spent uncharacteristically long hours talking on the phone. I often found myself eavesdropping on conversations around me. Those I conversed with often knew that I was researching the restructuring of the schools, but I was not sure whether they knew what that meant or what I was looking for. On these occasions I tried not to initiate the conversation and instead waited for the subject to come up, which was inevitably the case. I usually approached people with bland questions such as *'What is happening now?'* or *'What are you doing now?'* and allowed the respondents to react in whatever way they chose. Stakeholders sometimes approached me and asked me similar questions. When I told them I was at university researching the restructuring they often proceeded to give me their interpretation of the process. I developed the habit of carrying a small tape recorder with me so that I could capture as much authentic communication as possible as soon as these conversations were over.

The fact that I was researching a very topical issue in the community turned my friends and family into my "research assistants". They were all interested in my study, which made it a less lonely pursuit. They became my eyes and ears and reported to me on what they thought was important data. There was no division between my private life and my research. My husband learned interviewing techniques by watching me and gathered information for me from his acquaintances.

173

A casual motherly question *'How was school today?'* was not meant to probe my child about his school experience but was meant instead to illicit information from him for my research. It was my son who eventually reminded me, as I turned another parents' evening into a fieldwork, that *'it [was] not all about [me]'*.

Observations

I saw myself oscillating between being a participant and a non-participant observer. I felt that, as a result of being a member of the community and also a parent, I was to a certain extent always a participant and part of the process I was investigating. As a past Board member and manager I participated in many of the events that took place prior to the restructuring of the Jewish community schools, and I had experienced first-hand the first few months of the restructuring until my retrenchment. As a "non-participant" observer, I observed numerous AGM and PTA meetings, conferences, and public and private meetings. I took notes of these meetings and recorded my feelings as well as the audience reaction to what was going on. I had to constantly examine my perceptions and compare them with other evidence, such as documents and interviews. My perceptions sometimes coincided with other sources; sometimes they varied. The degree of my involvement was uneven across the schools, depending on the opportunities and events that took place at each school. During these observations I had to keep a neutral stance and not get involved, even when my opinion was requested. Keeping silent did not make me into an "objective" observer; I always had hopes and fears for the meetings. I was happy when people managed to get the right information, and disappointed when I felt that they were being misled. I was frustrated by my forced "neutrality" and despondent when the "other side" was winning.

Personal accounts

I kept a journal throughout the research process. The daily entries contained reports and reflections on informal conversations with stakeholders, my observations of various meetings as well as my feelings and thoughts. I took notes regularly and promptly. I decided to write everything down, no matter how unimportant it seemed at the time. This proved to be most useful. When I later analysed the data I realised that the roots of certain developments were already recorded in my diary.

Keeping a diary had other advantages as well. First, it chronicled the restructuring process and was thus an essential tool in keeping the order of events. Second, as pointed out by Miller and Bell (2002), using a research diary to document access routes and decisions made throughout the research process is a practical way of developing an ethical and methodological checklist. Moreover, the practice of regular reflection helped ensure that ethical and methodological considerations were continuously assessed. Most importantly, the journal became my confidant, wherein I could safely express my emotions and reflect on my worldview.

Documents

Documentation for my research was abundant and provided me with a rich database. The following types of documents were used:

Board's documents – I used a comprehensive set of documents produced by and about the schools from the time of their establishment in 1948 until April 2003. These included mission statements, policies, proceedings of conferences, consultants' reports, the schools' magazines, the Board's newspaper *Davidi* (which was terminated during the restructuring process), previous academic research, school brochures and prospectuses, adverts, budget reports, etc.

The media – The local Jewish newspaper, *SA Jewish Report*, chronicles the history and activities of the local Jewish community. The editions from January 2001 to June 2003 were reviewed in order to explore the main issues that concerned the community during this period, as well as to examine how the restructuring of the Jewish community schools was featured in the newspaper. The most revealing data was what the newspaper did not report and the bias it exhibited. In this context, Macdonald (2001) urges researchers to notice the selectivity displayed by a newspaper and the bias imposed by its editorial policy. Moreover, he advises researchers to pay attention to distortion and propaganda where the source of the news is engaged in the wholesale creation of a particular point of view.

Correspondence – I was able to access most public letters and notices to parents or teachers from either the Board or the schools, open letters from teachers or parents to the Board, letters to the editor, etc. In the process of the investigation I was also able to access some private correspondences between stakeholders – these have not been quoted but the information gleaned was used when appropriate, without exposing the source of the data.

175

Minutes – I was able to access most of the Board's executive committee minutes, the minutes of the Employee Forum, as well as those of the PTAs and AGMs from all the schools. Furthermore, the CEO was obliged by labour law to consult with the "old management" as part of their retrenchment process. These consultations produced nine hours of recorded data in which the CEO spoke incessantly about his plans and initial experiences of the restructuring. The transcriptions of these tapes became an invaluable source of research data, especially as the CEO evaded a personal interview.

Even though the documentation was comprehensive, there were important gaps in the data. I did not have access to most of the Board's or the schools' internal documents. The same is true of financial records, correspondence between the CEO and various stakeholders, etc. I avoided asking for documents so as not to compromise my informants and only accepted those documents which were offered to me voluntarily. I am nevertheless convinced that I have enough documentation to support my findings.

Data analysis

The transcripts of the interviews and my personal diary produced over 1700 pages of text, and I was able to manage this data by using Atlas.ti. In the first stage of analysis I coded and recoded the interviews line by line, which helped me to discover recurring themes and to develop ideas and concepts. For example, Table 4 illustrates how the response to the question *'What is your understanding of the restructuring?'* was analysed:

Table 4 – Analysing text

Interview – Community leader, 8 May 2002. Interview number: 76 (example)	Code
Well, I'm somebody that is not happy with the way the Board is being restructured, and I can't say that I understand fully what the intention is.	76:1 (4:6) Understanding – not clear – secretive – hidden agenda
The restructuring of the Board came about *because* of the financial mismanagement of the Board of Education, for which there are a number of people that could be held *accountable* for this situation.	76:2 (6:9) Reason – mismanagement (Comment – blame and accountability)
Primary to this situation is probably that we *did not have adequate leadership* – people that were not able to control situations, were placed in areas of high responsibility and nevertheless, it was just assumed they would cope with the situation. And they share some of the *blame* perhaps, but I'm not sure it's a fair blame that they carry because it was too high an expectation.	76:3 (9:15) Reason – leadership was not adequate (Comment – emerging theme – blame)

Part of this problem came about *because of emigration*. We were short of people to appoint. The search possibilities were not adequately done.	76:4 (15:18) Reason – emigration

The numbers 76:1 (4:6) – mean that it is document number 76 in Atlas.ti, quotation number 1, lines 4–6. All this information is available in the footnote corresponding to each quotation, together with the code's label, for example:

Community leader, 8 May 2002. [Document 76:2 (6:9). Codes: Understanding - financial].

I began by accumulating codes such as: "understanding – financial" or "understanding – only Hebrew was restructured", etc. Figure 1 illustrates the numerous codes that were associated with the family "understanding of the restructuring", which corresponded to the different perceptions and understandings of the process. The number in the brackets indicates the number of quotations associated with each code. The tilde (~) indicates that a comment was attached to the code, or that this code had been amalgamated with ex-codes (see also Figure 2).

Figure 1 Family – understanding of the restructuring (1)

Understanding – attack on teachers and professionalism {1-0}
Understanding – coup d'etat {4-0}
Understanding – did not affect me {1-0}~
Understanding – financial {11-0}
Understanding – only Hebrew has been restructured {2-0}
Understanding – ideological {3-0}
Understanding – minimising staff for financial reasons {3-0}
Understanding – more work for Hebrew teachers {1-0}
Understanding – not clear – secretive – hidden agenda {6-0}~
Understanding – not clear whether financial or educational {3-0}
Understanding – not clear whether financial or ideological {3-0}
Understanding – nothing has changed {4-0}
Understanding – the Board has been restructured {2-0}~
Understanding – the CEO top-down restructuring {4-0}
Understanding – the only way to save the school {3-0}

While the codes in Figure 1 provided me with the stakeholders' first reaction to the question: *'What is your understanding of the restructuring?'* the deeper meanings of these perceptions were generated in different stages of the interviews, as is demonstrated in Figure 2, and were gathered under the code names beginning with *restructuring*. For example, 'restructuring – change the people in power'; 'restructuring – not going to work'. Figure 2 illustrates how these codes were defined, by coding and recoding the data. Each code name included the ex-codes and some of

the comments that made it up. The comments reflect my thinking and the process by which theory was generated.

Figure 2 – Family – understanding of the restructuring (2)

Restructuring – Change the people in power {1-0}
Restructuring – Concerns {19-0}~
 Ex-code – Restructuring – not going to work
Restructuring – Consultation {32-0}~
  [Difference between consultation and participation.]
  [Stakeholders were quite happy with the facade of consultation – can it depend on the zone of tolerance? They just don't want to be told what to do – but they do not have a strong opinion this way or the other.]
  [When other stakeholders' ideas were used it has been used to serve as justification for preconceived beliefs and ideas.]
 Ex-code – CEO – consulting with people outside the community.
 Ex-code – Process – need to work together
  [Some stakeholders whom the CEO claimed that he has consulted denied meeting or discussing certain issues with him.]
 Ex-code – Restructuring – Consultation – giving a façade
 Ex-code – Process – consultation – using stakeholders as a sounding board.
 Ex-code – Process – consultation with the wrong people.
Restructuring – creating distrust between teachers and parents {7-0}~
  [Creating distrust is part of manufactured uncertainty...]
 Ex-code – CEO – seeking parents' support
Restructuring – crisis management {17-0}~
 Ex-code – Restructuring – need to be drastic
 Ex-code – Restructuring – needs to be harsh
Restructuring – dishonest and deceitful {4-0}~
 Ex-code – Restructuring – deceitful
Restructuring – Expectation {16-0}
Restructuring – Expectation – but nothing happened {7-0}~
 Ex-code – Restructuring – expectation – disillusions
 Ex-code – Restructuring – did not change what needed to be changed
Restructuring – Expectations – more professionalism {1-0}
Restructuring – Explaining lack of consultation {7-0}
Restructuring – Financial or educational {12-0}~
 Ex-code – Financial or educational consideration
Restructuring – financial or ideological {8-0}~
  [There is interplay between ideologies and financial that it was not uncommon to have an informant telling me at the beginning of the process that it was ideological and later change their mind – hegemony? Common sense?]
Restructuring – Had to happen {3-0}
Restructuring – Hearing about it {9-0}~
 Ex-code – hearing about changes at social gathering
 Ex-code – Restructuring – heard about it through the grapevine
 Ex-code – Management – hearing about changes in their department/school from general letters to parents
Restructuring – Hidden agenda {15-0}~
 Ex-code – CEO – hidden agenda
 Ex-code – Hidden agenda – CEO
Restructuring – Impulsive decisions {4-0}
Restructuring – Long term planning {9-0}

178

Restructuring – No change at school level {11-0}~
    Ex-code – Restructuring – the schools run as before
    Ex-code – Restructuring – did not impact the school
Restructuring – No clear map of change {16-0}~
    Ex-code – Restructuring – not clear
    Ex-code – Process – mixed versions
    Ex-code – Process – none of this was clear
    Ex-code – Process – orders were given and retracted
    Ex-code – Process – secretive and anonymous
    Ex-code – Process – too hasty
Restructuring – No communication {6-0}
Restructuring – no transparency {10-0}~
    Ex-code – Process – mystery
    Ex-code – Process – instructions are not in writing
    Ex-code – Restructuring – anonymous
Restructuring – No trust {13-0}
Restructuring – Part of a bigger change in SA {2-0}
Restructuring – Quick fix {7-0}
Restructuring – Rumours and uncertainty {18-0}~
    Ex-code – Rumour
    Ex-code – Gossip
Restructuring – Top-down {15-0}
Restructuring – Was good for the system {8-0}~
    Ex-code – Restructuring – had to happen
    Ex-code – Reason – it had to happen
Restructuring went bad – Need miracle {14-0}
Restructuring went bad – Who is to blame {6-0}

I inevitably accumulated a great number of codes (539), which I grouped into families according to the topic. Figure 3 describes some of these families. The numbers in brackets indicate the number of codes associated with each family.

Figure 3 – Code families

CEO (68)
Cost cutting (31)
Centralisation vs. decentralisation (3)
Goal setting (12)
Hebrew vs. Jewish Studies (11)
Parents (18)
Previous Board (13)
Process of restructuring (33)
Reasons for restructuring (25)
Teachers' reaction to change (13)
Understanding of restructuring 1(16)
Reasons for financial deficits (19)
Impact on managers (31)
Impact on parents (28)
Impact on teachers (28)

I initially looked for codes that answered my research questions while highlighting the managerialist terminology, such as cost cutting, efficiency, accountability, etc. As the

story unravelled and a theory was constructed, a secondary layer of analysis allowed me to alter, redefine and delete categories according to the emerging themes. I added a few families, such as "resistance", "restructuring by consent", "manufactured uncertainties", "bullying and coercion", "blame and guilt", etc. and collected all the codes that would substantiate those claims.

I used only limited functions within Atlas.ti; I had to make a trade-off between dedicating valuable time either to learning the software or to investing it in fieldwork and reading. At the later stage of the research, when I was writing my dissertation, I realised that some of my codes were too broad and in some cases I had to re-code them. For example, in the code "impact of the restructuring on the religious base", I included all the quotations; those that supported the view that there was a definite change and those that maintained the opposite view. I came up with 54 quotations. Sometimes, few quotations were collected in one interviewee. I therefore had to re-code them in order to get some quantitative indication as well as to choose one quotation for each interviewee, as illustrated in Figure 4:

Figure 4 – Re-coding "impact on religious base"

Impact - religious base (54)
Impact - religious base - dichotomy (3)
Impact - religious base - has already been changed (9)
Impact - religious base - more impetus (12)
Impact - religious base - no change (11)

I found Atlas.ti to be especially useful for stakeholder research. It allowed me to separate the interviews into different stakeholder groups and I was therefore able to isolate and compare their views. The software allowed me to examine particular themes in isolation by retrieving data associated with them. Figure 5 is an example of an output document in which all quotations for the code: "financial situation – improved", were collected together from across the whole database. Reading and rereading the quotations for each code allowed me to account for the diverse perspectives. However, this segmentation often broke the sequence of an interview and had the danger of taking sentences out of context. It was therefore important to refer to the interviews as a whole.

Figure 5 – 9 quotation(s) for code: financial situation – improved

Manager - 21.4.02.txt - 4:2 (23:24). Codes: [Financial situation - improved]
I know that the financial situation is much better than it ever was.

Teacher - 14.4.02.txt - 13:23 (362:374). Codes: [Financial situation - improved]

> There are a lot of positives. The fact is that a lot of pressure – somehow we feel that that financial pressure – that we have been relieved of the fact that that's been taken care of. And I really do think that's a good thing, because I do think that in the past the Jewish Board of Education didn't have anybody who was sufficiently qualified or experienced, to deal with the financial side.

Manager - 4.11.02.txt - 19:33 (582:584). Codes: [Financial situation - improved]

> Look, I think the financial position has improved. I don't know whether a good accountant couldn't have done, without all the trauma that went along.

Manager - 1.7.02.txt - 36:11 (674:715). Codes: [Financial situation - improved]

> My theory was … that a lot of people were putting money in before and watching it going into a bottomless pit that was not being administered properly and they eventually said 'No more'. I truly believe … that the way the previous group administered the finances was pathetic, there was abuse, there were expenses incurred that were laughable … and I do believe that when [the CEO] came in and said: 'Right, those expenses are going to stop, that kind of abuse of money, that kind of maladministration of money is coming to an end' then those people said: 'OK, fine, provided it is being used in the correct way we will still stand by Jewish education'. And I think those same people are there. We never knew who they were … but there must have been a lot of others and I think they have come back and they are giving the money.

Parent - 14.8.02.txt - 40:61 (1180:1189). Codes: [Financial situation - improved]

> I don't think that what [the CEO] did, someone else may have done differently if they would have been brought in.

Honorary officer - 13.8.02.txt - 45:20 (472:496). Codes: [Financial situation - improved]

> Look, [the financial position] is, in inverted commas, under control. It will never be totally under control because everything is dependent on how much subsidies you have to grant, and the number of people who can't afford fees. And unfortunately this position is probably going to get worse rather than better because we still face an emigration of round about 2–3% of our school population every year. … But I think the schools are now actually running at a profit, or at break-even, with the exception of Victory Park where I think there's a small loss there, but nothing material overall. … The idea was that once at least the schools stop bleeding, that you could then approach major donors in the community and say – look, we've got it as much under controlled as we can. We still need R8 million, or R10 million a year, to subsidise those families who cannot afford fees.

Honorary officer - 27.8.02.txt - 46:26 (795:799). Codes: [Financial situation - improved]

> From what I've been told and from what I've been shown in terms of graphs, I mean I haven't sat there and gone through figures and that – but I believe it is better.

Manco member - 07.03.03.txt - 65:25 (825:848). Codes: [Financial situation - improved]

> The first year I was in, those first few months, we lost R4 million. The first year that [the CEO] was in we made R400,000 and this year we are going to

181

> make R13 million … we are going to have a surplus of 13 million … We still have liabilities which we have to pay off … but we don't operate with an overdraft anymore. We don't have major donors that are coming in. It has been operating costs to save money, its been amazing … It's that turning around from closing schools to not closing schools.

Manco member - 07.03.03.txt - 65:41 (1194:1202). Codes: [Financial situation - improved]

> Yes the financial situation is brilliant. We still have debt and we want to pay it off. We can't rely on the community as they are all battling. We realised that the community was not going come to us and they were not going to put money into a bottomless pit. And in fact the IUA and UCF, they've cut the allowance to us and they haven't got the money so we have to do it ourselves.

Writing the dissertation

I had two audiences in mind while writing the story of the Jewish community schools' restructuring: the research community; and the school community. The former required a detailed description of the cultural, social and ideological aspects in order to understand the context within which the restructuring took place. My main concern with the latter was to represent their actions and thoughts truthfully and in a sensitive way, as well as to ensure as much as possible the confidentiality and anonymity of those who were represented in the case study. Moreover, while the research audience is interested in the theoretical explication and the methodology of the case study, the school community is interested to know what happened and why. This required a compromise between telling the story, explaining it and theorising it.

The writing posed a few challenges for me, such as data reduction and selection, striking a balance between description and analysis, and de-emotionalising the text. I found the latter to be the most demanding task. While emotions played an important part in the process of the research, and had been acknowledged as such, it was also important to control them in order to theorise the findings. The process of de-emotionalising the text required constant writing and rewriting that may have not been necessary in a less emotional context. My supervisors' input in this progression was vital as they constantly made me aware of examples where my personal identity took over my identity as a researcher.

The research report was organised according to emerging themes and constructs relating to the conceptual framework, rather than following a sequential description. There were two exceptions to the thematic analysis. The one was the Prologue, in which a panoramic view of the process was provided. The second was

the vignettes. In each vignette a single policy was followed from initiation to implementation. A vignette is described as *'a focus description of a series of events taken to be representative, typical, or emblematic'* for the case study (Miles & Huberman, 1994:81). It has a narrative, story-like structure that preserves chronological flow. The vignette thus provided a detailed portrayal of a selected policy, in which the various constructs identified in the case were described in natural sequence of their occurrence and in real time.

Validity

There are multiple notions of validity. In this research I refer to validity as the trustworthiness of the reported observations, interpretations and inferences, as well as the research applicability to readers.

In order to increase the validity of the case study, I introduced the following checks:

- The most obvious validity check was triangulation, that is, the convergence and divergence among multiple methods, empirical materials and perspectives (Cohen & Manion, 1994). Triangulation reflected an attempt to secure an in-depth understanding of the restructuring of the Jewish community schools, bearing in mind that objective reality could never be captured. Especially relevant to my study was the triangulation of sources and methods of collection. The methods included interviews, document analysis and personal accounts. The sources included different stakeholders. Owing to the interconnectedness of my respondents and the abundance of rumours and hearsay, I tried to ensure that the information did not originate from the same source. I therefore often asked my interviewees for the source of their knowledge. Since I had to rely in many instances on what informants said without observing for myself, I sought corroboration wherever possible by cross-checking different accounts of the same situation and by referring to documentary evidence.

- It is clear that I entered the research with a certain worldview and that the research was influenced by my emotions. In order to ensure validity, my personal worldview, assumptions, emotions and beliefs were disclosed. Keeping a personal research diary in which I was able to reflect on my assumptions with regard to the data collected, facilitated this process. Altheide and Johnson (1998) describe it as

"validity as reflexive accounting"; a process that places the researcher, the topic and the sense-making process in interaction. Researchers have to substantiate their interpretations and findings with a reflexive account of themselves and the process of their research. They must be committed to obtaining the members' perspectives on the social reality of the observed setting, to report the multi-vocality and to show, if possible, where the author's voice is located in relation to these. It is based on the notion that all knowledge is perspectival and that the reader must have an explicit statement about *where the author is coming from'* (ibid:294).

- Member checking increased the trustworthiness of the accounts. It involved taking data back to the informants, discussing with them whether the interviews reflected their attitudes and then incorporating their comments into the research. This validity check was in line with my epistemological belief that there were many "truths" and that these were relative to one's personal worldview. Moreover, member checking is considered to be an ethical handling of the research findings as it allows informants to control the facts that affect them and how these facts are used in the research (Walker, 1980). I found advantages and disadvantages to this approach. On the one hand, it increased the validity of my research, especially since the transcriptions were sent back to the informants a few months after the interviews had taken place. Confirmation of the transcription and the conversation that followed validated the data and even provided some longitudinal perspective. On the other hand, as the restructuring process became more ruthless and an atmosphere of suspicion and fear prevailed, some interviewees were concerned about what they had revealed to me. Even though they confirmed the transcripts, they were afraid that they might be identified. I realised that sending the interviews back to the respondents increased their feelings of disempowerment, rather than empowerment. I then decided to send back transcripts only to those who had requested such.

- Peer examination is a valuable procedure by which external observers review the data and the research process. It provides an additional, relatively "objective", lens through which the researcher is able to reflect on the experience. As this research was done for a degree purpose, my supervisors provided this validity check.

- In a qualitative case study it is important to be realistically modest with regard to the extent to which the findings can be generalised outside the case study or even

within the case study stakeholders. I am nevertheless confident that my findings can be extended beyond my 72 interviewees. I received confirmation of that when I fed some findings back into the system a few months after I had concluded the fieldwork. When I spoke on two occasions to an audience of some 600 people in June 2003, my interpretation of the restructuring provided them with a "click of recognition" experience, described by Lather (1986) as "face validity". The participants subsequently issued a vote of "no confidence" in the Board, which became instrumental in the later suspension of the CEO.[10] This provided me with another validity check, described by Lather as "catalytic validity" and represents the degree to which the research energises the participants towards action and the transformation of their reality.

The limits of the research

This study explores the experiences of the stakeholders of the Jewish community schools during the organisation's restructuring. By virtue of it being a qualitative case study of a unique system, the research limits the potential for generalisations or for inferences that can be drawn from it.

The research spanned the first two years of the restructuring. It could therefore mostly provide a snapshot of the reform at its earliest stage, which usually focuses on the initial structural change – while change in consciousness or practices takes place slowly, sometimes almost imperceptibly over time (Ball, 1997a). Ball further maintains that it is not clear at what point it is valid to begin to draw conclusions about the effects of policy. It is for this reason that I prefer to use the term "impact" rather than "effect". Moreover, this research was done as a requirement for a PhD degree and was therefore limited in time and resources. This is a characteristic of many case studies, where practical and empirical issues are often interwoven with the research design. It is further claimed that case studies are never finished, just left (Walker, 1980), usually at the point of "data saturation" whereby the information becomes redundant (Bogdan & Biklen, 1982).

Any research that attempts to explore a process of restructuring invariably contains a comparison between the new structures and the old ones. While the former was the topic of this case study, the latter needed to be constructed. The "story" of the

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[10] See Chapter 6.

schools was constructed over the years by various writings, mostly generated by the schools or the Board, by pictures, adverts, events, celebrations and mostly by memories and reflective accounts of students, ex-students, parents, teachers and other stakeholders. Research was mostly complimentary; rigorous social inquiry was absent and criticism was limited and was dealt with in an ad hoc manner. However, despite the lack of reliable evidence, these images have an enduring power to affect both consciousness and behaviours (Grace, 2002). In fact this "imagined" community becomes the reality against which the impact of the restructuring could be understood.

The limitation of this approach is the tendency of many stakeholders to romanticise the past while trying to come to terms with the emotions of change. In a way, therefore, this study could contrast the best of the imagined community with the worst of the managerialist reform.

Another limitation for the research relates to my "insider" position, yet it also gave me an advantage. As an educationalist, researcher, parent, member of the community and a past employee of the Board, I had an intimate knowledge and interest in the schools and the wider community. This knowledge placed me in a unique position to listen to the voices from the inside and to investigate a process that will probably have an irrevocable impact on the community. However, I was clearly not observing the process from a position of detachment. I was involved at all levels: intellectually, emotionally, religiously and professionally. This raised a strong potential for bias which I tried to neutralise by self-questioning, by reflecting on my motives and assumptions and disclosing them in my personal journal, and by the constant searching for disconfirming evidence.

Another limitation is added by my previous position at the Board and my retrenchment. It is suggested that the personal and professional identity of researchers would have some significance on the way people respond to them (Cooper, 2001). For example, stakeholders who supported the change and who were instrumental in my retrenchment did not feel comfortable during the interviews. It was important to encourage them to relate to me as a researcher and not as a past employee. At the same time, many other stakeholders trusted me, and revealed their stories to me because of my past position.

As this chapter clearly illustrates, the case study was emotionally charged. I did not, however, perceive emotions as a limitation but rather as an additional layer of meaning which contributed to a deeper understanding of the change process.

Lastly, I am aware of my need to protect the "inside stories" of the community, the schools and my colleagues, as the system is identified and personalities can be recognised. Some names are mentioned, especially those quoted in the Jewish community newspaper, but I tried to omit any data that could clearly identify a respondent or that could be interpreted as an attack on certain personalities.

Ethical considerations

Ethical concerns cropped up throughout the research process and appeared in many forms. They emerged when I tried to achieve a balance between my intentions, on the one hand, to know and expose the hidden processes at work in the restructuring of the Jewish community schools and, on the other hand, to protect the privacy of individuals and the schools, as well as to protect the image of the Jewish community and not to uncover processes that might be exploited by those who have a less favourable view of the community.

By adopting a reflexive approach to the research I was engaged with the following dilemmas:

- The informed consent of my respondents was a major ethical dilemma for me. Even though my respondents were happy to cooperate as long as they remained anonymous, I am quite sure that most did not have a full understanding of how some of the information they had provided me would be used. In one case, I was asked by a stakeholder whether she was allowed to give me the minutes of a committee she was involved in. I had to inform her that legally she was not allowed to do so, but was grateful when she ignored my advice. I am sure that in some cases I received minutes or documents from stakeholders who wanted me to expose certain processes. I therefore found myself treading a thin line between giving voice to respondents, betraying them and being used by them.

- I constantly debated to what extent it was ethical to be friendly and to establish a relationship of trust with my interviewees, especially those with whom I disagreed. Moreover, I was troubled by the ethics of turning casual conversations with stakeholders into research data without their knowledge. I tried to overcome these challenges by ensuring maximum confidentiality and anonymity. When citing an interview I identified most respondents only by category. Each category included a few positions. For example, the management category included

principals, their deputies and vices as well as coordinators at a system level. Interviewees could be placed in more than one category. For example, an art teacher who was also a deputy principal and a parent could be identified by any one of those categories, depending on the topic that was being investigated and what would give the interviewee the best cover. I realised, however, that this cover would never be complete. I am sure that in many cases the "community" would know who the informants were. Some could be recognised by the way they think, by the way they talk or by their actions. Moreover, some stakeholders' identities could not be disguised and they were therefore described by their positions. These included the CEO and other members of the management committee (Manco). Still, when possible I referred to them as lay leaders or honorary officers.

- Since the investigation was an emotional challenge for me, I had a need to share and speak about my experiences. My supervisors and family were a safe sounding board. A unique ethical dilemma emerged when one of my co-supervisors, who was also a parent at one of the schools, became involved in defying the new management. While having a co-supervisor viewing the restructuring process with me added another lens and much depth to the case study, ethically it affected us both. At one stage we refrained from discussing the process so as not to influence the research. I was careful not to reveal my sources even to her. After I concluded the fieldwork we cooperated in writing articles and letters to the local newspaper and in addressing parents' meetings.

- Another ethical dilemma emerged when I refused to help stakeholders, even when I had the knowledge/power to do so. I often wanted to shout out in PTA meetings that the information the speakers were giving was simply a manipulation of the facts. On one occasion I could not tell a friend that a Manco member was deceiving her. I knew that my uncritical acceptance of the stakeholders' perceptions helped to reinforce some misconceptions. I was often frustrated by my self-imposed silence, especially when I realised that by the time my findings would appear most of the processes would be completed, and most of those in charge would have moved on, after achieving their immediate goals and sometimes receiving financial benefits. I slowly came to terms with my role as a researcher, which was infinitely different to my previous role as an educator. As

188

an educator my role was to help and to educate; as a researcher my role was to observe and understand. This shift from educator to researcher is referred to by Labaree (2003) as the cultural divide between adopting a normative perspective to adopting an analytical perspective to education. He rightly maintains that novice researchers should be made aware of this divide and the means to bridge it.

- Being a member of the Jewish community exposed me to the perennial problem of Jewish researchers, that is, the extent to which we would like to expose the "inside" stories of our community to outsiders, especially as I was not indifferent to the community's feeling of isolation and depression, and the increasing incidence of anti-Semitism worldwide. I constantly debated whether uncovering processes in the community and disseminating the research findings would mean I was being disloyal to the community. I was concerned whether my findings would be used to the disadvantage of the community. I argued these issues with various stakeholders who often make their opinions heard in public. Three different approaches emerged. The one distinctive approach was that debate and open inquiry should always be avoided, as it would "destabilise the community", display its flaws to the outside world and might therefore increase anti-Semitism. This type of thinking is demonstrated in Chapter 3 of this dissertation and will be discussed again later. The second approach was that it was important to be sensitive to the context and the times and not to be too critical:

> Ten years ago, I could say my job was to look under the carpet and to see what was there and what was being hidden. This is still my responsibility, but maybe the boundaries have shifted: that the need for some kind of comfort for the community is greater today than it was before. The community is in crisis; Jews are in crisis all over the world … [but] eventually you have got to be true to yourself … but it's complicated.[11]

The next interviewee suggested a similar approach:

> My own view is that provided you put it in a sensitive context and acknowledge the difficulties that a small community of Jews of less than eighty to ninety thousand … with a history … of an anxiety that they weren't going to be wanted at all ... It's perfectly understandable that we would have behaved in this fashion. If you put it in this context I think you should go for it. The contrary proposition is to keep silent, which is what the establishment wants you to do … In the long run those of us who keep silent about this … what are we going to pass down to our children? That is the real question.[12]

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[11] Other stakeholder, 6 March 2003. [Document 67:24 (581:598). Codes: Ethical issues].
[12] Community leader, 3 June 1003. [Document 73:9 (382:423). Codes: Ethical issues].

The third approach was that the diversity in the community should be acknowledged at all times and that one should not suppress any kind of inquiry or open debate. The following citation exemplifies this approach:

> I don't have that dilemma, precisely because I think … there is only one way in which that can end up. It can only create a situation in which small groups of people control a community without any challenge ... . So I don't think it is loyal to allow that to happen. … Sending out a message that there's no diversity in this community – that everybody thinks the same – is to me absurd. In what way does that make anybody respect you more? That we are all working like robots? If Saddam Hussein gets 100% of the votes, is anybody impressed with it ... obviously not.[13]

I eventually came to a decision that being loyal to the community meant to be truthful to its members, to respect their right to know about processes that impacted on their lives, and to celebrate the diversity within the community. At the same time it was vital to keep a constant mental view of the context and to acknowledge the uncertainties, fears and difficulties that stakeholders encountered while adapting to rapid changes in transitional times.

On reflection, my responses to the above dilemmas were not always ethical. Compromises and mistakes were made along the way. In some cases I felt like a spy in my own community. I realised that I was using interviewees' painful experiences as "interesting" research data. I sometimes faked rapport to encourage interviewees to trust me with their stories. Duncombe and Jessop (2002) describe similar tactics and argue that the skills of "doing rapport" have been commodified in the training of qualitative researchers. In this context Fontana and Frey (1998) also argue that most traditional in-depth interviewing is inherently unethical, whether wittingly or unwittingly, and that the techniques and tactics of interviewing are really ways of manipulating respondents while treating them as objects rather than as individual human beings. Finch (1984) aptly describes her feelings of betrayal when she comments that she emerges from interviews with the feeling that the interviewees need to know how to protect themselves from people like her. She feels that the information she gets in return for flimsy guarantees of confidentiality has real exploitative potential. At the same time Duncombe and Jessop (2002) remind us that interviewees are not totally powerless and that they can withdraw their participation.

By constantly reflecting on the above ethical dilemmas I realised that I needed to decide to whom I am accountable. Being accountable limits the choices one can make in the pursuit of truth. Burgess (1994) maintains that researchers need to strike a

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[13] Other stakeholder, 8 November 2002. [Document 32:29 (1102:1163). Codes: Ethical issues].

balance between moral accountability and responsibility to those who are researched; professional accountability in relation to ethical codes and principles, such as the right of the researcher to disseminate data and to whom the data belongs; and contractual accountability, that is, accountability to one's sponsor or employer. As I had no sponsor or employer, I realised that I am first and foremost accountable to my interviewees and to the people who put their trust in me. Being accountable to my interviewees motivated me to represent them faithfully, without exposing their identity.

Being accountable to my respondents required me to reflect and expose my position with regard to them and to my research topic. It is clear that in terms of my research topic I was both an insider and an outsider. This duality produced opportunities and challenges. The opportunities arose from my intimate knowledge of the system and its recent and not so recent history, as well as the power structures and the individuals associated with the system. It also brought up some challenges as to what extent my pre-knowledge influenced the choice of respondents. It required me to reflect constantly on my choices, and occasionally to approach some informants whom I would not have approached under personal circumstances.

Being both an insider and an outsider presented me with more ethical dilemmas. Griffiths (1998) makes this point very clear when she argues that the researcher as an insider is drawing on the normal ground rules of reciprocity and trust that characterise social interactions. Being a researcher means using these ground rules for research purposes, thus risking exploitation and betrayal.

Being both an insider and an outsider further impacted on my feelings towards my interviewees. At the beginning I felt anger, especially towards those who were instrumental in my retrenchment or towards those colleagues who eagerly took over some of my roles and the work that I had produced over the years. I felt sorry for those school members who were struggling to make sense of the changes and who were trying to keep their jobs and livelihoods, while being bullied by management. I was annoyed when informants refused to make their objections public and to act on what they revealed to me, especially when I felt that they were compliant for the sake of political expediency and self-interest. I was grateful to those stakeholders who did their utmost to help me with the research and who collected data for me. I was encouraged by those stakeholders (regrettably, only a few) who took a moral stand against some processes or individuals, regardless of personal discomfort.

As the restructuring proceeded I felt that I became a confidant and a sounding board for many stakeholders. I felt that some informants eagerly unburdened themselves on me, recounting their fears, rumours and disagreements in the hope that I would act on their behalf. Towards the end of my fieldwork I was emotionally exhausted and I started to resent this role. I had to remind myself constantly that I had submitted myself to this role for my own selfish needs, that is, writing a doctorate. This posed another ethical predicament for me, namely: Was it fair to stop being a sounding board after I completed the fieldwork and no longer required the information? When I eventually detached myself from my respondents I was acutely aware of Ball's (1997a) comment that research is always in some degree both reactive and parasitic. He maintains that:

> Careers and reputations are made as our research flourishes upon the rotting remains of the Keyensian Welfare State. Both those inside the policy discourse and those whose professional identities are established through antagonism towards the discourse benefit from the uncertainties and tragedies of reform. Critical researchers, apparently safely ensconced in the moral high ground, nonetheless make a livelihood trading in the artefacts of misery and broken dreams of practitioners. None of us remains untainted by the incentives and disciplines of the new moral economy (257).

In summary, through constant self-examination, reflection and ongoing discussions with colleagues, I am confident that I have confronted many of the problems associated with this kind of research. I do not claim that my research is objective, since complete objectivity is not possible (Peshkin, 1988), but I believe that I was able to describe the different worldviews, mine included. I also believe that my emotions were not a hindrance or a source of bias, but rather the fuel that challenged me, gave me the passion for my research and provided me with both a perspective and an insight that an "objective" and uninvolved researcher might never have achieved. The importance of emotions in research is relatively unexplored terrain. Hargreaves (1998b) makes the point that emotions are an integral part of rational thinking, as one needs to feel in order to judge. Likewise, McLaughlin (2003) argues against the polarity of reason and emotions and calls researchers to engage in the emotions induced by the loss of control, risk taking and confusion as part of the research process. My experience confirms Mclaughlin's conclusion that:

> Emotional blindness will not enhance the research process: it will only drive underground the examination of assumptions and processes in individuals and groups that hinder fruitful exploration (2003:78).

From the research I have learned about my history, my community and myself. I have learned the virtue of patience and the art of waiting. I have learned not to be swept up by rumours and hearsay and not to get caught up in emotional reactions. I have learned to feign ignorance and to ask rather than answer. I have learned to remain silent and to resist the temptation to correct errors of interpretation. I have learned to identify my feelings and to act on them. I have learned that there is no useless information. I have learned to listen, to collect pieces of evidence and to wait until they can be patched together to complete the puzzle, that is, the *bricolage*. And I believe, finally, that these valuable lessons kept me writing within the boundaries of a responsible qualitative research report.