Widening circles

Case studies in transformation

Series editor: Melissa Steyn

Within the context of a changing South Africa, which itself is grappling with finding its place in a global community, every organisation and institution is affected and must address questions of transformation if they are to survive.

INCUDISA is publishing this series of case studies to contribute to a necessary information base for practical use by organisations committed to taking up this challenge in constructive and effective ways. In this endeavour, we are all sailing new waters, and need to share the charts as we go. Every time an organisation or institution embarks on a process their experience can provide meaningful guidelines for others.

Each context has particular permutations and needs to be understood on its own terms. Case studies show exactly how the details in a specific context are addressed. Where one is dealing with change management, there is no single model that can be applied across the board without careful contextualisation. In whatever way the underlying generic issues may be articulated in an organisation, interventions have to be appropriate and carefully structured to meet the needs of that situation. Case studies are useful in showing this process of engagement with a particular context at a particular time – the misunderstandings, successes, diversity issues, conflicts, breakthroughs – that form the daily lived experience of a changing environment.

This series rests on the principle that the more carefully one understands the specific issues of a particular case and the degree of success it achieves, the more useful it becomes to people facing similar issues in a different context.

Melissa Steyn, Director
(INCUDISA)

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Networks of Accountability: HIV/AIDS Action Research in Action on Western Cape Farms

Mikki van Zyl

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Networks of accountability: Action research in action on Western Cape Farms.

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Abstract

During 2005 Mikki van Zyl was contracted as a consultant to do action research on farm dwellers' perceptions and experiences of HIV/AIDS in two districts of the Western Cape, South Africa. She was selected by the client, Centre for Rural Legal Studies (CRLS), a rural NGO working on human rights inter alia for her reputation as a lifelong gender activist and feminist scholar. The research project was the fist step in a provisional three-year process to develop and implement integrated strategic interventions for addressing HIV/AIDS on farms through multi-stakeholder forums in the two districts.

Employing a team of community researchers working in local rural NGOs on HIV/AIDS we used individual interviews, focus groups, case studies, researcher field notes, evaluations and workshops for our dataset. We spoke to a purposive sample of farm dwellers, farm managers, and service providers ranging from those working in the field to those responsible for policy. We used quantitative information descriptively to provide a context for interpreting our qualitative information.

The research process is presented as a case study – focusing on the context, dynamics and challenges in conducting the research and preparing the groundwork for setting up the stakeholder forums. The case study covers the one year research planning, implementation, analysis and dissemination of results. The salient issues which are discussed encompass balancing a sexualities, culture and development framework with feminist methodologies, while integrating strategies to facilitate action.

The first chapter sketches the background and context of working with Western Cape farm dwellers in the current South African economic and cultural milieu of post-apartheid globalisation. Next the theoretical framework of gender, sexualities, culture and development are explicated, with a particular focus on how discourses on HIV/AIDS impact on the environment, and the significance of gender and race disaggregated data to plan interventions.

I proceed with an elaboration on the methodological issues in chapters three to six. In chapter three I explain how the research design was tailored for CRLS's policy and programme needs viz. sustainable rural livelihoods. The implementation of feminist research methodologies, and dealing with 'sensitive' issues such as sexuality and HIV/AIDS and multi-lingualism are discussed in chapter four. Chapter five forms the core of the case study, as it sketches the ethics of research as reflected in Van Zyl's model 'networks of accountability' – relationships between funders, client, consultant, employees, sub-contractors, partner institutions, associates, community researchers, respondents. Chapter six details the preparation for the research: capacity building with community activists – building researcher teams – including the training of community activists in research methodologies (course profile included). Chapter seven shows how

ongoing reflection through evaluation is essential to gathering reliable data, with a focus on how the necessary tri-lingualism (Afrikaans, isiXhosa and English) in the research team contributed to quality of information.

Finally, in chapter eight I conclude with how the process of research itself becomes part of the 'action' of advocacy. (*Executive summary of the research report* available at: http://www.crls.org.za/Publications.html).

Contents

chapter one

Context: Western Cape farms

This chapter (with edits) is excerpted from the first chapter of the report, Straight Talk: HIV/AIDS on farms in the Western Cape, *and sketches the background for doing research on HIV/AIDS with farm dwellers in the Western Cape. It contextualises the environment within the current South African economic and cultural milieu of post-apartheid globalisation.*

Sustainable Rural Livelihoods

Since HIV/AIDS was first diagnosed more than twenty-five years ago, the stigmatisation has continued, changing shape, but still 'othering' people who become infected with the virus. Embedded in a dominant culture which fuels contempt for 'others', it comes as no surprise (Skinner and Mfecane 2004). But many other factors contribute to the continued stigmatisation HIV/AIDS, not least the values that attach to discourses of sexuality (Pigg and Adams 2005). HIV is a virus which attacks the immune system and its major route of transmission is through unprotected sexual contact. Therefore one cannot address the HIV/AIDS pandemic without addressing sexuality and sexual practices. Historically the arena of sexuality has been one of aggressive contestation in Westocentric discourses (Foucault, Rubin, Weeks) and in the modern postcolonial African state has become a terrain for the assertion of an imagined African 'tradition' in sexual and gender relations (Hoad 1998, Reddy). The price for these discursive battles are paid by people who become infected and for a myriad reasons mostly suffer and die without being able to access support or treatment.

Furthermore the economic implications for global economic dependencies are manifold through for example: the medicalisation of HIV/AIDS discourse (Treichler); human rights discourses (Petchesky); morality discourses (Pigg & Adams); donor funding (HSRC); pharmaceutical industries (TAC) and research (.

Poverty

In South Africa farm residents who work for commercial farmers have since the beginning of the twentieth century resided on the farms where they work, carrying on a tradition initiated by slavery in the earlier centuries of white occupation of South Africa. Large-scale appropriation of land by settlers from the indigenous population, which started as soon as they settled during the 17th century, escalated during the 18th century and accelerated aggressively throughout the 19th century (Buthelezi 2005). By the time the new democratic government came into power whites owned 87% of the land. It was challenged with the massive problem not only of the equitable redistribution of land, but also in the social and economic development of large rural populations. Many farm workers are still locked into exploitative dependencies with predominantly white commercial farmers. Those rural dwellers who retained their own land and are engaged in subsistence farming have been squeezed into small patches of land incapable of sustaining the populations dependent on them. To date only 3% of land earmarked for redistribution by 2014 has been redistributed to landless South Africans, with farm dwellers experiencing a worsening of their land rights since 1994 (Hall 2005:7).

Various structural factors have contributed to the gradual decline and change in employment on commercial farms. The Growth, Employment and Redistribution (GEAR) macro-economic policy has shifted an emphasis onto urban development and manufacturing, the service industries and tourism. The only sustainable employment in the rural areas is on commercial farms, but they have been decreasing permanent work forces in favour of using casual labour and labour brokers.

The statistics vary, but on average there are about a million people employed on commercial farms in South Africa, with two thirds being full-time workers and the rest casual or seasonal. About five people depend on the livelihood of one worker, therefore the death of one worker leaves five more destitute (PAETA 2005). The resident population on farms has diminished over a number of years through developments in the agricultural economy, and also as agriculture comes to represent a smaller share of the macro economy. In spite of protective legislation, evictions from farms have increased by around 12% over the last ten years (Nkuzi Development Association 2005).

In addition, the farm dweller population has some of the lowest literacy and education rates (around 37% with no schooling and 39% with education levels of up to seven years). Farm employees on commercial farms therefore are consequently considered to be unskilled, and the majority have average monthly incomes below R500 p.m. - below the legal minimum wage (Vink). Since democratisation, the gap in earnings between women and men has widened, making women farm workers even poorer than their male counterparts (Statistics South Africa 2004).

The feminisation of poverty

Despite the government's stated intentions of erasing gender inequalities, the global trend of the feminisation of poverty continues unabated. Most of the people evicted from farms over the last ten years were women and children (Nkuzi Development Association

2005). Heteropatriarchal conceptions of the family position men as heads of household and breadwinners, though spouses and children are expected also to work for the farmer. Women who are not attached to a man find it difficult to get employment or housing in their own right. Combined with social factors such as joblessness, poverty, alcohol and substance abuse, women's and girl children's vulnerability to gender based violence is increased, and consequently their vulnerability to contracting the HI virus. Intersections of gender and poverty make women more vulnerable to HIV infection because of economic factors which result in lack of access to information and services, and an inability to adopt HIV preventive behaviours because of social and cultural forces that result in gendered sexual experiences and expectations.

HIV/AIDS

The escalating HIV/AIDS pandemic impacts not only on the economy – figures as high as 17% decrease in the GDP than would have been the case without HIV/AIDS (Garbus 2003) – but also on social development. It exacerbates rural poverty through a cycle of draining household resources from lowering household income (through for example wage earners getting ill) to using available resources such as those allotted for education instead for supporting ill members with nutrition and treatment. Overwhelmingly women and girls are burdened with responsibilities for caring for the ill, and limiting their ability to earn money. As more dependants rely on less income, women might be forced minimally into sex exchange to supplement the basic necessities (Preston-Whyte et al. 2000) if not to engage in sex work *per se*.

Until this year (2006) South Africa was the country with the highest number of people with HIV in the world – an estimated 4.8 million people – with 10.8% prevalence in the population, 13.3% for women, and 8.2% for men (Shisana et al. 2005). It is also estimated that 25% of South Africa's agricultural labour will have died because of AIDS by 2015 (Garbus 2003). Farm workers make up 9% of the economically active population in the Western Cape and stand at around 202 949 (Vink 2003: 3-4). Though the Western Cape remains the province with the lowest prevalence, incidence[1] and rate of HIV infection, the province's commercial agricultural sector forms a significant part of the economy (Vink 2003).

It is only by examining the multiple intersections of factors that create an environment in which the HIV/AIDS pandemic flourishes that one can begin to develop strategies that address the phenomenon in a holistic way.

1. Prevalence: percentage population estimated to be HIV-positive. Incidence: number of people infected in certain samples. Incidence figures are more factual than prevalence.

A sociological approach to the HIV/AIDS pandemic

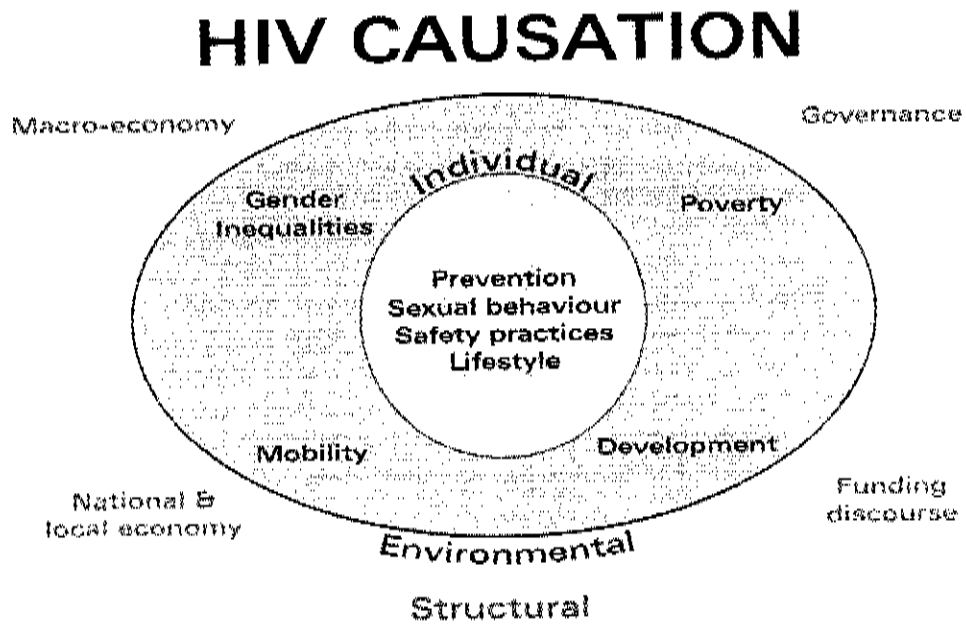
Since HIV infection is classified as an illness, many of the discourses around it have focused inordinately on the medical/scientific aspects of the epidemic, and tending towards individualising responsibility for its spread. However, we need to grapple with the complex historical, economic and social contexts in which human behaviour is acted out, in order to understand the impetus behind the spread of the infection. Causation of the pandemic must be understood as the responsibility of individuals as well as organisations, groups and particularly the state. In particular people in unequal relations of power over others are deemed more culpable in the spread of HIV/AIDS.

Many social, psychological and communication models have been mooted in attempting to address behaviour modification of people at risk of infection. These easily sink into individualistic strategies. Other models address social and structural factors more explicitly, but rarely is there a focus on the imbrication between them. I elaborate on the model of causation as developed by Sweat and Denison (1995) which identifies three spheres of causation:

- individual
- environmental
- structural.

Grappling with the manner in which all these articulate together in a given context, will best inform strategic interventions for the targeted community.

FIGURE 1. CAUSATION MODEL



Understanding the context of HIV/AIDS on farms

Globalisation and the liberalisation of trade in South Africa has led to shifting employment conditions in the commercial agricultural sector. So-called 'free' trade has caused reductions in labour costs as countries compete with each other for select markets. In South Africa the history of apartheid has left its footprint of paternalism on farms, in spite of political and legislative changes. Though the causes for changes in employment patterns on farms are complex and layered, there is a trend to use off-farm seasonal and contract labour rather than permanent employees who live on the farms (Barrientos, McClenaghan and Orton 2005).

Set against recent labour legislation which has evinced many problems regarding compliance, the government policy since 1999 regarding HIV/AIDS has sown widespread confusion at best, and at worst exacerbated the stigmatisation that leads to unnecessary deaths. The intersection of labour legislation requiring an HIV/AIDS workplace policy, and the atmosphere of confusion around HIV and AIDS has resulted in a vacuum with employers failing to develop policies for their workers, and address universal safe practices for prevention of infection in the workplace.

With almost fifteen percent (15%) of its population infected with HIV in 2005, South Africa's HIV/AIDS deaths are estimated to account for more than 30% of all deaths – the single highest cause of death – and the outcomes for social and economic development look bleak unless the pandemic is seized by the throat.

To date, the Western Cape has remained the province with the lowest HIV rates, which has not been researched, but could be attributed to political differences in provincial and local governance – the health department (DOH) introduced prevention of mother to child transmission (PMTCT) in 1998 and had reached all 25 districts by March 2003, with ARV treatment available throughout the province by 2004 (Abdullah 2005). Other significant differences in the province are that the majority population in the Western Cape are coloured people and that the Western Cape agriculture is a primary economic activity for the province's GRP, notably wines and fruit.

Conditions on farms vary greatly, and are largely dependent on the attitude of the owner/management. With a legacy of the *dop system* still widely in place on Western Cape farms, alcohol abuse poses a significant problem in addressing HIV/AIDS (London 1999). Women who are abused by a sexual partner are almost 50% more likely to be HIV-positive (Dunkle et al. 2004), and in the research almost two thirds of respondents mentioned family violence on farms.

In spite of their relatively privileged position compared to farm dwellers in other provinces, people on farms have limited access to a variety of resources and opportunities to address HIV/AIDS. The persistence of a culture of paternalism, perpetuated by farmers and dwellers alike, means that access to housing, health, education, transport and other amenities is frequently mediated by the farmer. The role of management in setting the tone for addressing the pandemic is therefore very important, though this does not mean that employers should be held responsible for the individual behaviour of dwellers.

Stigmatisation is the largest issue to be addressed as it drives HIV/AIDS underground. Stigma arises in an environment where groups of people identify some people as 'other' because they perceive them as somehow different and 'less', and consequently unequal. The outcome is one of disrespect, and blame (Skinner and Mfecane 2004). However, one needs to understand stigma in a more nuanced manner. Stigmatisation also expresses deep-seated fears about one's own security. For example, if I believe that 'other' people get HIV/AIDS because of who they are or what they do, it makes me feel secure from infection because I am 'not like them'. Thus stigmatisation encourages me not to take responsibility for my actions because I have positioned myself beyond the reach of vulnerability to the infection.

Much of the stigmatisation concerning HIV/AIDS is centred around discourses of sexuality and sexual practices. As a traditional arena for social control – by the state as well as religious and civil society organisations – competing gender blind discourses have sown confusion and misinformation. For example, evidence is mounting to show that women have been victims of the erroneous perceptions that 'one partner' will keep them safe, as worldwide, HIV infection rates for (married) women who assert that they have had only one partner rise . It is well-established that the most reliable method for

preventing sexual transmission is the use of a condom, regardless of the number of sexual partners.

Civil society, government, religious institutions, as well as certain organisations in the international funding arena perpetuate confusion through turning the HIV/AIDS pandemic into opportunities for jumping on moral bandwagons. This is illustrated by the incident earlier in 2005 when Brazil turned down $40 million in HIV/AIDS funding from the USA because the fund refused to give money to organisations who supported sex workers or gay men (Cairns 2005).

Integrated strategies for addressing HIV/AIDS on farms

Integrated strategies for addressing HIV/AIDS on farms would necessarily develop a common vision among stakeholders and participants to address stigmatisation. These strategies would need to address the causation of the HIV/AIDS pandemic at all its levels, for example:

STRUCTURAL

- advocacy for influencing government policy
- strategic acceptance of funding – checking what are the 'strings attached' to funding

ENVIRONMENTAL

- gender equity
- non-discriminatory attitudes to sexuality
- labour relations
- support services
- open discussions about HIV/AIDS to overcome stigmatisation
- educational opportunities and facilities
- addressing social issues such as alcohol abuse

INDIVIDUAL

- sense of agency and control over own life
- access to testing and counselling
- supportive environment where disclosure is possible
- access to treatment
- job security

Increasingly there is a realisation that top-down behaviour change models do not work (Niba and Green 2005). Those incorporating participatory learning methods which maximise participation from the target audience, and in particular, emphasise peer education have shown much higher success rates. In working with people with low self-esteem (as is the case with many farm dwellers) life skills help to develop individuals' sense of self-respect. In the HIV/AIDS arena, identity work has helped HIV+ people to

not only come to terms with being HIV+, but also to become actively involved in campaigning around the issue (e.g. Treatment Action Campaign's *HIV positive* campaign). These are the factors that have been proven to contribute to risk reduction behaviour.

However, these changes will not take place if the environment does not offer greater security in terms of employment, access to health care and future treatment. Where people are in relations of dependency and powerlessness in relation to others (employer–employee, men–women, service provider–client), these hierarchies will divest individuals of agency, and will undermine such efforts.

The complacency towards HIV/AIDS in the farm environment needs to be contained by government legislation, and clear policies and implementation of countrywide treatment.

Stakeholders in a coalition can come from different positions in addressing the causation of HIV/AIDS, therefore duplication can be avoided if roles are worked out, and cooperative strategies can simultaneously address the different levels.

In the next chapter we elaborate on the theoretical framework and appropriate methodologies for implementing action research.

'The personal is political'

In this chapter I examine the theoretical framework and conceptual tools underpinning the research design.

Seeing gender

Both feminism and diversity studies critique the way in which dominant ideologies about social hierarchies translate into inequality, discrimination, prejudice and oppression – ranging from the institutionalisation of oppression to the violent repression of groups considered inferior and marginalised. Both focus on how difference has been constructed and perpetuated to justify inequality.

The Second Wave of feminism starting in the late sixties and early seventies in Europe and North America gave rise to women's movements and organisations focused on sex/gender issues. Feminist theories have ranged across various paradigms, from biologistic to constructionist, from materialist to functionalist (Van Zyl 1988) located in intellectual frameworks labelled radical, cultural, Marxist/socialist and liberal/bourgeois feminisms (Jaggar 1983; Wolpe 1998) What unites such apparently diverse views is a common conception of society structured through patriarchal relations, and a commitment to eradicating women's inequality. How this arises and is to be addressed varies from framework to framework, and also historical context to context.

In South Africa, apartheid politics polarised the society – academics, institutions, and women's struggles. Many white women, influenced by the western movements, adopted a feminist stance – for instance, the anti-rape movements (the first started in 1977 in Cape Town), had by the early 1980s positioned itself as explicitly feminist. In contrast, the anti-apartheid movements had mobilised women since the forties, but did not differentiate gender oppression of women by men. Therefore the tradition of feminist theorising and research at the time reflected western ideas, with only a small group of predominantly white, middle-class women and a few men adopting feminist analyses.

They were often criticised mainly by black women, as well as some of their white colleagues, for not understanding black women's position or struggles. Third world feminists[2] challenged western feminisms (see for example Jayawardena 1986), particularly for essentialising the concept of 'woman', and insisted that class, race and colonialisms were inextricably interwoven with gender. Mohanty (1991:65) proposed an intersectional analysis of the category 'women' - which is articulated through a number of categories which are imbricated in 'a variety of political contexts that often exist simultaneously and overlaid on top of one another'. This would enable feminists to avoid over-generalisations while recognising the commonalities and differences between women and their experiences.

During the nineties in the West, backed by institutional resources, feminisms became increasingly specialised. The nineties saw the rise of post-modernism and a rumoured era of post-feminism in the West (Hall & Rodriquez 2003) and, inspired by third world feminists, the inclusion of other intersections of oppressions in their theorisation. In Africa, lacking the institutional support, 'feminists'[3] came from different political and theoretical foundations, where intellectuals were based in women's movements. Since democratisation, feminism in South Africa has burgeoned and become the subject of lively and ongoing debate.[4] The diversity of knowledge and ideas is shaped by a

> fusion of genres, disciplines and subject-matter - shaped by actively engaging different cultural and social processes - that can be marshalled in theoretical considerations (Lewis 2002, http://www.gwsafrica.org/knowledge/index.html).

To this day many African feminists work in policy-related or advocacy fields, while most present-day feminisms recognise the intersectionality of women's oppressions. Gerda Lerner (1997: 182) details a framework which accounts for the intersections of gender/ race/ class by using the following analogy: each concept is an intellectual tools which can be likened to diagrams of the human body – each one separately depicting for example the blood circulatory system, or the skeleton or the nervous system. Though one can grasp them individually, until they are integrated as a totality, there will be little understanding of how the whole body functions. Similarly, as a feminist one cannot grasp how the social body works it one cannot integrate and contextualise all the concepts that co-articulate with gender.

2. This does not necessarily mean that they are located in the third world, but that their work centrally integrates analyses of imperialism.
3. I use the term to denote people including gender as a key concept in social analysis. In the West, black women resisted white feminist labels by vigorous criticisms and insistent self-labelling, using the term 'womanist' instead of 'feminist'. Some African-based scholars also adopted this label.
4. There are currently several feminist journals in South Africa: *Agenda* has brought out six issues on African feminisms, and *Feminist Africa* has published five issues, also accessible at http://www.feministafrica.org/2level.html. There is also *SAFERE* (Southern African Feminist Review) and various online feminist journals, e.g. *GWS Feminist Knowledge*.

Though many feminist researchers during the eighties claimed that women's lives should be the focus of feminist research (Mies 1983:127; Reinharz 1983:167), this exclusive scrutiny of women or gender is often a luxury in development settings, where project funding may be constrained by other agendas. Therefore, as a feminist activist researcher, I take care to design the research process with a critical feminist lens – in the HIV/AIDS research on farms the participants occupied multi-layered positionalities. (The sampling and planning for the HIV/AIDS research on farms is discussed in detail in chapter three.)

Feminist methodologies

Research is what research does (Hilsen 2006:29).

One of the core tenets of feminism is 'the personal is political' (Eisenstein 1984:12). Therefore, reflection on our everyday experiences will give us insights into the structural factors that shape our lives. In this way, politics is linked to social life, and by extension, if we want to change the everyday conditions of life we need to become active in politics. The knowledge about women gained through personal exploration also works against the bias of patriarchally constructed knowledge. This has been called feminist standpoint epistemology by Harding (1987) which requires a methodology which resonates with women's experiences (Walby 1990). Therefore feminist epistemology and methodology is intricately linked to feminist activism. 'Bread and butter' issues have given rise to women's activisms both in the West and in Africa (Lewis 2002). However, not all women's movements address gender inequalities i.e. the oppression of women through patriarchal relations (Wolpe 1998:86).

For many feminist researchers (Mies 1983; Jayaratne 1983; Hilsen 2006; Walker 1998) 'the personal is political' also has ethical implications for research praxis – research must be aimed at transforming gender power relations. However, this might place the researcher in oppositional relationships with various social institutions (including the state), creating an ambivalence for researchers who are positioned in patriarchal institutions, while at the same time trying to change them. Audre Lorde's (1983) question about 'dismantling the master's house with the master's tools' is relevant here. But through history and socialisation we have to varying degrees been equipped with the master's tools, and needs must use at least some of them, though we must do so critically.

During apartheid, researcher-activists had a clear-cut antagonistic relation to the state, but post-apartheid their relationships to the state have shifted – much research informs and is supportive of state policies, while others may adopt a critical but conciliatory stance. Meyerson & Scully (1995) put forward the notion of a 'tempered radical' who occupies an *ambivalent* position – someone who is simultaneously positioned in opposing structures but does not want to provoke open conflict, therefore works strategically to achieve changes. In acknowledging ambivalence, one avoids either confrontation or cooptation, but occupies the terrain of ongoing struggle. It is in this space that we address the ethics of action research (AR) – a conscious and deliberate

intention to transform the existing relations of inter alia gender power and inequality. The research must not only have the *aims* of transforming society, but the *process of research* itself must question and subvert those relations of power.

Relying as it does on representing people's subjective realities means such research is mostly qualitative, but Jayaratne (1983:140) warns against feminists dismissing the value of quantitative research out of hand. (Mouton and Muller (1998:14) also note that South African research discourse hasn't reflected the antagonisms appearing between quantitative and qualitative research in the USA.) Further Lewis (2002) contends that research emanating from political activism and the lived experiences of people about whom researchers write shapes historically-grounded and activist-oriented scholarship in distinctive ways. She asserts that 'feminist research and practice, if it is not to betray its progressive thrust, is always relational and partial'. Progressive research practices have moved away from the insistence on 'objective research', realising that there is no value free research. There are numerous frameworks for ensuring the rigour of qualitative research (Denzin & Lincoln 2003; De Wet & Erasmus 2005) and that the value of recognising subjectivity in research contributes in a unique way to the mapping of the world as others experience it as well as exploring the subjectivity of knowing (Walker 1998:243). Therefore through the praxis of action research knowledge becomes socially anchored and politically located (Christians 2003).

Action Research as Ethical Practice

> [I]t is through our practice that human beings 'live our ethics'. For me, as an action researcher, this means that it is through my scientific practice that I demonstrate my ethical foundation (Hilsen 2006: 24).

Human life is relational, therefore action research as human practice affirms the intersubjective nature of society and hence the contingency of knowledge. Barazangi (2006:97) argues that the theory of 'action research (AR) pedagogy ... is, at its core, ethical in nature'. At the centre of action research lies the goal to increase people's capacities to become agents in their own lives. Therefore multiple dimensions of ethical principles need to be applied to the research process. Furthermore, action research bases its praxis in a context of recognising social inequalities, and attempting to transform relations of oppression, inequality and social marginalisation. Action research is concerned with developing and disseminating knowledge for political ends – activism, advocacy or empowerment for participation in political processes. Therefore there is an assumption that action researchers will have a strong commitment to social justice and democratic values. To transform these relations requires a deep analysis of power relations, not only in society, but also reflexively in understanding the power relations between participants in the research process itself.

> The ethical demand of AR is about the power relationships inherent in the social sciences. Because the social sciences *can* make a difference in people's lives, power and responsibility are unavoidable issues (Hilsen 2006:32).

Power is not something possessed by an individual, but is always expressed as a social relationship (Van Zyl 1988). The researcher's position of power – particularly the power to define and shape discourse – in the research process must be acknowledged, but it also carries a responsibility for how the outcomes of the work and impacts on other people. Significantly, there is also an onus on the researcher to use her position of power to represent and give voice to marginalised people.

Because the relations of power in a research process are complex and intertwined, it is useful to create a map of these power relations and the onus of responsibilities on different individuals and groups involved in the research process. I call this map a *network of accountability*, and explain the one applicable to the HIV/AIDS on farms research in detail in chapter five.

Key Concepts in Action Research

The South African Constitution is a document which irrevocably asserts the value of mutual respect and equality in difference. More than that it confirms the power of affirming diversity which is reflected in the South African national motto, 'strength in diversity'. Lister (2004:96) discusses the logical misnomer of equating difference with inequality, and where an elision is made between equality and sameness. The foundation for a critical diversity framework requires an uncoupling of these terms, and a revaluation of difference and equality. This is also a position debated amongst feminists who question what women's equality would look like, while recognising that women and men are different and have different needs, but that mutual valuation of the differences can overcome inequalities, and particularly shift power and control. It has also been a theoretical task which has been elucidated clearly in many feminisms around the sexual division of labour (Delphy 1984; Tiffany 1986; Hakim 1996). Therefore drawing on the insights of feminists who have articulated difference as not being incompatible with equality, I look at what action research might mean.

Firstly, in a world where difference is manifest, the core values must be one based on respect for diversity and a support for human rights.[5] Secondly, an acceptance of diversity also implies that there is no single truth to be dis-covered,[6] therefore a diversity

5. Human Rights discourse, despite tendencies for it to become universalised and essentialised, has its own history and has been criticised for its westocentric origins in liberal humanism. However, it does present a workable framework of value for measuring social relationships, though it needs contextualisation. In South Africa various values as inscribed in the Constitution, e.g. re-instituting the death sentence but banning termination of pregnancy, are being contested through ongoing debates in the society (Rule 2003).
6. And, incidentally, calling into question the need for triangulation as a method of validating research (Walker 1998:249). However, a diversity perspective would affirm

framework affirms the intersubjectivity of knowledge production, as well as acknowledging that meanings are contextual and not unitary. Action research methodology is epistemologically appropriate for theoretical frameworks which affirm transformation for social justice, democratisation and respect for diversity.

Equity / equality

I make a distinction between *equity* and *equality* because *equality* emphasises treating people the same, but doesn't accommodate significant differences which may affect the outcomes of equal treatment. When diversity is not taken into account, *equal treatment* tends to default to the unequal status quo which fails to recognise the very different conditions under which people attempt to live and work in society – the prejudices and obstacles which 'others' face, the subtle and overt ways in which people are made invisible, silenced or stigmatised as outsiders. *Equity* recognises difference and accommodates it in order to prevent the continuation of an inequitable status quo. Simple *equality* as a concept also does not to accommodate the changing definition of *equity* – in the past it often meant *equality of access*, but I use it to mean the more recent use as *equality of outcomes*.

Bias vs. conscious partiality

In the post-apartheid era in South Africa, many tests, theories and tools previously considered 'objective' were re-evaluated and condemned as culturally biased (see for example Freund 1998:29). It opened the way for an acknowledgment that research in the social sciences can never be 'objective' – a viewpoint promoted by many feminists (Stanley & Wise 1983; Mies 1983; Bhavnani 1994), Afrocentric researchers (Sono 1998:78) as well as critical researchers in other fields. Our tools are always shaped by culture: existing knowledge, discourses and ideologies which are organised according to hierarchies of value. And what many researchers fail to acknowledge is the un-knowable – that knowledge is always incomplete and fluid.

> The postulate of *value-free research* ... has to be replaced by *conscious partiality*, which is achieved through partial identification with the research objects (Mies 1983:122 – emphases in original).

The research should therefore not be measured through an attempt to establish some complete and static 'objective' truth, but be located in a framework which places both researcher and researched within a social context, where meanings may be negotiated. Therefore, the researcher's own positionality must be made clear within the process. Action research therefore affirms the socialised subjectivity (and human fallibility) of the researcher, and recognises that it is impossible 'to do research which is uncontaminated by personal and political sympathies' (Becker 1974: 107). Being aware of our pre-existing views / values alerts us to possible bias, but we should be impartial enough to be

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the gathering of different viewpoints as a way of increasing the depth and scope of the knowledge base.

proved mistaken. The key question is not *whether* we should take sides, since we inevitably will, but rather *whose side are we on*.

There is a danger that activist-researchers may be swayed by their commitment to transformation to produce research which is selective and incomplete. Therefore, it is critical that reflexivity is built into the research process from the start, so that an action–reflection–action cycle is integrated throughout the implementation of the research project.

Reflexivity – Looking in a mirror

Reflexivity and self-conscious evaluation are key elements in doing feminist research. Feminist researchers have rejected the 'distance' between knower (researcher) and what is known (research) promoted by 'male-stream'[7] research, claiming it is illusory and objectifying (Oakley 1981; Stanley 1991). In feminist research the act of knowing, and how what is known becomes known is asserted (Lentin 1994) through the process of reflexivity. Reflexivity introduces the notion of contingency and fluidity into the production of knowledge, and challenges the ideology and hegemony of scientism in social research. Stanley (1991) names this analytical process 'intellectual autobiography'.

> Intellectual autobiography, then, is the careful analytic explication of the reasoning procedures used in interpreting and theorising whatever 'research data' the researcher is concerned with (Stanley 1991:211).

Working in teams complicates reflexivity, but also helps to displace the discursive centre of the research – with one person 'in charge' of the discourse, the bias may become centralised, whilst working in teams where there is respect for difference, spaces may be opened for negotiated and strategic positions. However, the composition of teams is crucial, as in teams where some members are not gender or 'race' sensitive, they may inhibit gender and 'race' transformation through sexist and racist practices. This emphasises the importance of constant engagement and communication between team members as the research progresses.

Attention needs to be paid to several facets about the researchers' behaviour during the research implementation and the analysis of data (Stanley and Wise 1990:23):

1) The power relationships between the researcher/s and the respondents;
2) The emotional dynamics present in the research experience;
3) The 'intellectual autobiography/ies' of the researchers;
4) The different interpretations and priorities given to the research by different participants;
5) The outcomes of the research: who 'owns' the research, and whose voices are represented in which way.

7. A term which exposes the gender blindness of mainstream social sciences: i.e. not recognising patriarchal relations of power and discourse – and uncritically centralising masculinist perspectives and practices. 'Male-stream' was considered very apt, and quickly became popularised among feminist researchers.

Reflexivity therefore acts as meta-research, where the focus of contemplation is the multiple relationships and positionalities between people involved in research process.

Ethics in research

In conclusion, therefore, a feminist action research process should reflect feminist principles and ethics, where the research process is mutually accountable towards participants, understandable and of use to the participants. The process should be built on relationships of mutual trust, and celebrate goals of transformation. Through recognising our interconnectedness and acknowledging diversity and the consequent contingency of knowledge, challenges the concept of 'objective' research, and attempts to displace (but given the inertia of social structures seldom succeeds in erasing) the hierarchies of power between researcher / researched.

Working with 'differences'

For many years the term 'action research' has been used widely to describe any research that is done 'off campus' and/or with collaboration of activists. Academic feminists have often been accused of using the label for strengthening their own position and not necessarily for transformation. When AR is done by activists or independent researchers they have been criticised for not being rigorous enough, or wanting to support their 'own point of view', as though academic research is somehow more objective. Ironically, South Africa's apartheid past established a strong history of action research which was academically rigorous. Because universities and religious institutions were exempt from the strict funding restrictions applicable to anti-apartheid organisations or institutions, funding for action research was often allocated to projects in the liberal universities.[8] Though many academics have become 'institutionalised', a great many have maintained their passion for social justice and democratic participation (Walker 1998:240), and like myself, continue to contribute to policy and advocacy.

Since action research foregrounds problem-solving, it uses a holistic approach rather than a single method for collecting and analysing data, and may break through established epistemological boundaries. Thus, it allows for several different research tools to be used as the project is conducted. These methods, which are generally common to the qualitative research paradigm, include: keeping diaries; document collection and analysis; participant observation records; questionnaire surveys; structured and unstructured interviews; focus groups and case studies. The HIV/AIDS study used semi-

8. During the States of Emergency in the late eighties I was an action researcher involved in internationally funded projects for investigating and recording the actions of apartheid policing. This research would have been banned and the researchers arrested had it been initiated off campus. As it was some of the researchers were detained for questioning several times, but could legitimately claim they were involved in 'academic' research.

structured as well as open-ended interviews, interviewer reports; case studies; focus groups and discourse analysis of documents.

There are also different levels of activism, from adjustment/monitoring to more radical research which aims to develop strategies for overcoming dominant hegemonies that maintain inequitable power relations. *Straight Talk* leaned towards Radical Action Research (with its roots in Marxian 'dialectical materialism' and the praxis orientations of Antonio Gramsci) with a strong focus on transformation / development / capacity building – the overcoming of power imbalances to empower marginalised people, i.e. farm dwellers in two districts in the Western Cape.

In action research, action and reflection are integrated in a dialectical cycle of action, reflection, action and so on, so that what we learn is constantly related back to the context. Furthermore, based on the assumptions of diversity and our human interdependencies, the research process aims for maximum cooperation between all those involved. In this way, each person's contribution may be valued, as well as how they 'move' and develop during the process. One of the subsidiary goals of the research on farms was to build research capacity in local organisations working with farm dwellers on HIV/AIDS.

Researcher-respondent relationship

Traditional research has been criticised for perpetuating power hierarchies between researchers and 'research objects' who are exploited for the benefit of the researcher: not informing or deceiving them about the research aims; invading their privacy; scaring them; and giving little or nothing in return (Reinharz 1983: 80). When the researcher's needs have been met, the relationship ends. Feminist and diversity researchers assume that research participants have rights and agency, while simultaneously understanding that the research process is subtended on positions of relative power. What is more, as the research process continues, the unequal power is not resolved as the researcher/s become more powerful with the accumulation of information. Therefore, the 'owner' of the information usually has control over what must be done with the information. Being a feminist action researcher requires integrity and commitment to the empowerment of the participants *on their own terms*.

> Contrary to 'male-stream' edicts against emotional involvement, feminist research ... welcomes emotion into the research process (Lentin 1994).

In adopting a holistic and context-sensitive approach to research inquiry, also implies acknowledging the emotional dynamics that are inherent in any human interaction. For example, the passion of researcher/s for their endeavour, the fear of participants in being judged or the relief at having an opportunity to speak and hope of being heard. In particular, dealing with sensitive areas of people's lives which are fraught with emotion, such as stigmatised topics like HIV/AIDS or private like sexualities, must be approached with great circumspection. I discuss how we dealt with these issues in chapter four.

Purposive sampling

Purposive sampling is common in qualitative research where participants are selected on the basis of certain characteristics or positionalities. In work on diversity it is often used deliberately to include groups of people who are usually marginalised or excluded, or whose voices are not represented. In this way the research can be brought to speak on behalf of marginalised and oppressed groups (Mies & Shiva 1993:38). In the research we allocated minimum 'quotas' of women and African-language speakers as participants because within our sample of farm dwellers in the two Western Cape districts, they are more marginalised than the dominant grouping, coloured men. Much human rights research on farms[9] focuses on *workers*, i.e. employees on farms who are mostly coloured men, yet women also live (and work) on the farms.

Summary

> The ethical demand [in research] is also a demand to accept responsibility for the kind of society to which we contribute. And so we shall be known by our deeds (Hilsen 2006:34).

Summary of ethical guidelines

1) The research must aim for equality and social justice – to transform the relations of oppression and exploitation in society. Both the research aims **and** process must be part of ethical practices and contribute to transformation. The research must give voice to resistance which can disrupt the status quo.
2) The researcher/s must understand and make explicit the context of power in which the research process is located, and the agency of participants recognised and affirmed.
3) The researcher/s must choose 'whose side they are on' – i.e. should partially identify with the participants. This usually implies that they are activists situated in movements or networks who are struggling for equality, and that the research will support the work of such movements or organisations.
4) The researcher/s must be respectful of human diversity, and build this understanding into the research.
5) The research should represent the interests of oppressed groups, especially women and other groups whose voices have been silenced. This also 'writes into history' the stories of marginalised and oppressed people.
6) The research process must become part of a 'pedagogy' – empowering people and building their capacities to act, and to organise.
7) Reflexivity must be exercised throughout the process. Existing social hierarchies

9. The regional NGO, *Women on Farms* has an explicit focus of women on farms, while others will disaggregate information relating to women, they rarely do a gendered analysis.

cannot be erased with a few taps on computer keys – they persist and must be accounted for in the research. In particular, attention needs to be paid to 'voice' and who is 'speaking' in the research.

In this chapter I discussed how a theoretical stance of feminism informs my choice of action research methodology. I acknowledge the importance of adopting a holistic view, and paying attention to the detail of the history and context of the research location. I further move that a paradigm of human rights and mutual respect addresses the intersubjectivity between people, including researcher/s and participants. I further moot that the researcher has an onus to use the power of the research to advance and promote the interests of the participants.

chapter three

Getting Ready for Action

In chapter three I explain how the research design was tailored for CRLS's policy and programme needs viz. sustainable rural livelihoods. The research design is described and the roles and responsibilities of the various team members explained.

For several years I had been doing consultancy work for the Centre for Rural Legal Studies, among others writing for doing HIV/AIDS training on farms. Therefore, at the end of 2004, at the ten-year anniversary celebration of another NGO working in the rural areas, the operations manager of CRLS and I started chatting about their projects. Given my interest and expertise in gender and sexual rights, he asked whether I would be interested in helping them do a baseline survey on HIV/AIDS on farms. Early in 2005, the director of CRLS phoned me and asked me to quote for the project.

Getting the project off the ground

At a preliminary meeting in February we discussed the nature and scope of the project. Initially CRLS wanted to focus on farm *workers*, but after discussion we decided that it was important also to include non-employees, usually women. Including women is essential, as the statistics bear witness to the feminisation of the epidemic. Also, including 'families' is in line with many work-based interventions that include the families of workers in their awareness programmes.[10] Further, we identified our access to farms as a key financial and logistical constraint. Because of CRLS's work in providing legal services and advocacy around labour rights for farm workers, we had a history of a slightly adversarial relationship with farmers. As we could not afford the expenses of transport over long distances without any 'rewards' i.e. being prevented by farmers from

10. See for example Vass & Phakati (2006:50) where the awareness programme included a 'Family Day' for employees.

talking to the farm dwellers, we decided to work in the areas where we knew from experience we would have reasonable access.

By the middle of February we had a detailed project proposal and budget. By early March, we had invited a number of NGOs working in the rural areas to meetings in the two districts to discuss the proposal, and invite their participation. One of the project aims, was to establish forums for developing an integrated strategy for addressing HIV/AIDS on farms. We hoped they would participate throughout the research as resource organisations, and join the forums afterwards. The first step was to identify volunteers and workers doing HIV/AIDS work who wanted to work as contract community researchers in the study. They would be obliged to attend five days' training before they would be contracted. Thus networking for advocacy was built into the process from the start, emphasising the cooperative nature of mobilisation.

Developing the Research Design

The research was only the first element in a longer process to address HIV/AIDS on farms in the sustainable rural livelihoods programme of CRLS. The main aim was to develop an integrated and sustainable response to address the issue of HIV/AIDS on farms. It formed part of the ongoing task of empowering farm dwellers workers to deal with issues in their communities and workplaces. The information was intended to help CRLS and other stakeholders identify the obstacles which prevent the implementation of sustainable strategies for HIV/AIDS education, treatment and mobilisation, and to suggest strategies to overcome the problems. CRLS engaged in a strategy of networking with relevant stakeholders working with HIV/AIDS in the Western Cape Overberg and Eden districts.

The proposal described the rationale for the research, the scope of the research, research methods and some of the issues to be faced during the research process. It also delineated the sampling strategy, and who would be our informants in the study, as well as the structure and composition of the research team. Aside from slight changes, the main proposal was implemented in the research. Below I discuss our rationale for doing what we did, the reasons for decisions taken, and why we used the tools we selected.

Content: questions to ask

Our experience pointed us in the direction of various issues that would be relevant to investigating perceptions about HIV/AIDS on farms. These would need somehow to be incorporated in the research design.

Stigmatisation

At the time, South Africa was the country with the most HIV-positive people.[11] Stigmatisation of HIV/AIDS was known[12] to be one of the main obstacles to intervention and resource allocation. Fear feeds 'othering' and stigmatisation. Because we all fear AIDS, we readily buy into reassurances that promise that 'it can't happen to me'. 'Othering' leads to prejudice, feeding and perpetuating stigmatisation. This in turn causes community fragmentation, passivity, victimisation and an inability to mobilise for support or formulate coherent responses for advocacy.

People are afraid to be tested, and even if they know their status are afraid to disclose. It was therefore hopeless to try and establish HIV prevalence. Instead, we opted for exploring people's perceptions and experiences to gauge their knowledge of HIV/AIDS and their attitudes to it, both in the workplace and in their communities.

Farm dweller culture

The majority of farm dwellers in the Western Cape are coloured and speak Afrikaans. Coloured people in the Western Cape are at the highest risk for alcohol and drug abuse (Parry 1998, 2005). In the Western Cape, farm work and alcohol abuse have been intertwined for more than three centuries. Starting with slavery from the late 17th century the *dop* system[13] was used as an incentive to work harder, and even though the *dop* system has been technically illegal since the 1960s, it is still prevalent in various ways on Western Cape farms today. With no other recreational facilities, alcohol (and increasingly other drug abuse, especially amongst younger people) is a focal point for leisure, and the only relaxation for farm dwellers who are paid a pittance and mostly still live in impoverished conditions – for example, two thirds of farm workers in this area still receive below the minimum wage determined by the Sectoral Determination for Agriculture (Vink 2005:7). The links between alcohol abuse, gender-based violence and HIV infection rates is well-established (Dunkle et al. 2004; Phorano, Nthomang & Ntseane 2005; Vetten & Bhana). Therefore we needed to look for the links between alcohol, gender-based violence and HIV/AIDS.

Workplace Discrimination

Though the rural areas in the Western Cape have the lowest prevalence and incidence of HIV/AIDS (Shisana et al. 2005), a lack of comprehensive information on the prevalence of HIV/AIDS within the farming community makes it difficult to develop an integrated response to the epidemic. Estimates predicted that the labour-intensive fruit and wine sector may lose up to 60% of the domestic market by 2020 (Slater & Wiggins 2005). Moreover, a worker with full-blown AIDS will be absent from work 50% of time and function at 50% below capacity when at work. Furthermore, arbitrary and non-voluntary

11. By August 2006 India had overtaken South Africa in this dreadful statistic.
12. NGO workers in the field had experience of stigmatisation on farms, and it was also established through academic studies. See Deacon, Stephney & Prosalendis (2005).
13. *Dop* is the Afrikaans word for a 'tot' of alcohol, or a capful.

testing as a prerequisite for work contracts within a context of power imbalances between employer and worker can increase the vulnerability of workers and contribute to stigmatisation and secrecy. Job insecurity reduces particularly women farm workers' ability to bargain for workplace support for those affected and infected with HIV. Without a coordinated strategy and intervention to implement policies in the workplace, the agricultural sector was at substantial risk of addressing the pandemic too late.

Erosion of farm worker/rural dwellers' livelihoods

Households and communities who survive on a fragile micro-economy often choose to diversify their sources of income, and rely heavily on social networks in order to smooth over fluctuations in income. Given that 60-80% of AIDS-related deaths are due to malnutrition (Drimie 2002) – poor people are more at risk as they will be spending more of their disposable income on healthcare and less on protecting their food security, thus the cash income and family resources (time, labour) are diverted to care for sick and dying (Burger 2005). Social stigmatisation of families and individuals affected and infected with HIV/AIDS contribute to silencing people and general embarrassment about HIV/AIDS. Researchers as 'expert' outsiders asking questions about HIV/AIDS could start people talking, and open the topic to debate. We needed to talk to people about what they knew of support systems for HIV/AIDS.

Gender and the ethic of care

There are distinct gender dimensions to an increased prevalence of HIV/AIDS. In a context where gender-based violence is already high, it is assumed that GBV will increase as access to resources decreases, and the balance of power in the communities shifts. The illness will also increase the vulnerability of women and girl children and they will become more burdened with society's expectations to care for the sick and dying. This prevents women from working, girls from getting an education and increasingly what they do manage to earn will be spent on treatment and medications for the whole family. This pointed to including questions on care, but also to ensure gender disaggregations and gender-informed questions throughout the study.

Assumptions

From many years of working in the agricultural sector in the Western Cape we knew from experience that we could assume the following:

Information

- There was very little research regarding the occurrence of HIV/AIDS amongst farm dwellers in the Western Cape, or their attitudes towards it.
- There is a general lack of workplace policies to protect workers affected and infected by HIV/AIDS.
- There is a lack of and/or ineffective workplace bargaining forums on farms to ensure that anti-discriminatory practices are in place to protect workers.
- There has been a decrease in unionisation amongst farm workers.

- As far as could be established, there had been a generally inadequate and fragmented response from government and employers to the possible devastating effects of HIV/AIDS on the agricultural sector and the rural economy.
- Women farm workers/rural dwellers have limited access to social welfare grants.

Definitions

We agreed on definitions of terms as follows:

- *perception*: the way in which the respondent sees matters at a particular moment in time and describes them to a particular person
- *experience*: the narrative of an event as described by the respondent at a particular time, and to a particular person.

It is understood that the type and quality of information given to interviewers depends on the type of relationship they manage to establish with respondents. Different interviewers may get varying information from respondents.

From the perspective of qualitative action research, we sought out people's subjective opinions and attitudes. These would give us information about the person's psychological orientation towards HIV/AIDS, and asking about their experiences could tell us how they may behave - whether they will go for an HIV test, or whether they will disclose. We also relied on the 'news' value of the research, where the process of interviewing could change a person's views, and influence their actions. Therefore a structure for our questions was beginning to emerge.

Research Design

Research designs are not merely theoretical documents. They should be based on careful consideration and planning, and in practice are carefully balanced between available resources, content, accessibility to respondents, as well as having to be 'in tune' with a particular environment, and topic context. In the case of our study it included a sensitivity to the delicate emotional dynamics around HIV/AIDS.

Project Objectives

The project within which the research fell had much broader aims than the study itself:

- To determine the perceptions and experiences of HIV/AIDS within the agricultural sector in two district municipalities within the Western Cape province - Overberg and Eden.
- To understand how women on farm as a particularly vulnerable group within a marginalised community are affected by HIV/AIDS.
- To protect and encourage the protection of farm workers affected and infected by HIV/AIDS through promoting the establishment of workplace policies.

- To train 240 farm worker leadership and their management in Employment Equity legislation.
- To train 240 farm dweller leadership in HIV/AIDS awareness that will enable them to support individuals and households affected and infected.
- To promote gender awareness and an increase in gender sensitivity on farms.
- To provide farm workers with accessible information of available support services.
- To advocate for an increase in resources (facilities and services) to meet the health care needs of the farming/rural communities.
- To establish stakeholder forums in each district to develop integrated strategies for addressing HIV/AIDS on farms.

Research Aims

a. To investigate and document how diverse members of the farm dweller community perceive and experience HIV/AIDS:
    - in their communities
    - on the farm
    - in relation to the workplace.

b. To investigate and document how farm management perceive and experience HIV/AIDS:
    - on the farm
    - in relation to the workplace.

c. To investigate and document how diverse members of service providers (NGOs as well as government) dealing directly with farm workers perceive and experience the provision of services in relation to HIV/AIDS.

d. To interview service provision heads, to establish the effectiveness of implementing HIV/AIDS policies.

e. To refer to the environmental context, including public documents and material facilities to assess the availability and accessibility of resources for farm workers in relation to HIV/AIDS.

f. To contribute to the development of an integrated HIV/AIDS management strategy in the regions.

Methods

We decided to use a variety of qualitative methods for getting our information.

A **desktop study** of documentation relevant to HIV/AIDS in South Africa and the agricultural sector was used to contextualise the research. **Individual interviews:** anonymous semi-structured core questionnaires were used in face to face interviews with

farm residents, farm management and service providers. These interviews contained a filter question for an incident sheet which detailed **case studies** of people affected by HIV/AIDS.

Further we had **focus groups** with farm residents and service providers, and follow-up focus groups with key stakeholders after the presentation of the preliminary findings in the research. In addition we held **open-ended interviews** with named key stakeholders which were taped and transcribed.

Field notes were kept by interviewers during the interviewing and focus group processes and **evaluations** provide additional information relevant to the research and its processes.

Questions in the questionnaires were both quantitative as well as qualitative. The quantitative information was not to test for statistical validity but to provide us with a descriptive context within which to interpret the qualitative information. The topics ranged from individual agency to environmental and structural factors.

Sampling

We consciously delimited the research to regions which would fall within the geographic area of CRLS's ambit of strategic planning, and where researchers would have access to farms.

Geographic areas

We distributed interviews on farms throughout the two districts – Overberg and Eden. In Overberg we covered Cape Agulhas, Theewaterskloof, Overstrand and Swellendam municipalities. In Eden (Southern Cape) we included George, Kannaland, Knysna, Langeberg (Hessequa), Mosselbaai, Oudtshoorn, Plettenberg (Bitou), South Cape. Only those farms to which interviewers had access were included in the study.These regions were chosen because political boundaries are convenient geographic delimiters. During the research process the SA Demarcation Board published new boundaries and new names, but we did not regard this as significant as the areas themselves remained unchanged, and we were not seeking statistical representivity.

The respondents

In order to get a cross-section of the farming community we spoke to the following people: farm residents; farm management; service provider workers; key personnel in local service providers and government.

Quotas to represent marginalised groups

We also decided to place delimitations on the number of females (no less than 52% of the sample) and Xhosa speaking residents (no less than 20% of the sample) though these percentages were not necessarily demographically representative. We deliberately used a **purposive sample selection for diversity**. Therefore, not only the dominant

voices would be represented, but we would fulfil the criteria for representation of marginalised sectors in the community (Ladson-Billings 2003:408).

Practically, to achieve these ends we ideally needed to have interviewers from each of the municipalities in the two districts. Interviewers were divided into teams of two working together in an area. Each interviewer would have a quota of 12 farm residents, and do a maximum of three interviews on a single farm, ensuring that at least one was a woman and one a Xhosa speaker, if there were any living on the farm.

Unfortunately we did not get as many interviewers distributed as we would have liked i.e. one man and one woman, one of whom was Afrikaans-speaking and one who was Xhosa-speaking for each team. We therefore deployed some of our more effective teams to those areas which weren't covered.

Multi-lingualism

The research was conducted in the three most prevalent languages of the Western Cape: Afrikaans, IsiXhosa and English. Interviewers were matched with respondents by language so that interviews could be conducted in the person's language of choice. Instead of recording someone's 'race' we asked what their 'mother tongue' was, as we assumed it was a reliable indicator of 'race' and cultural background. All our community researchers were minimally bilingual, with everyone being able to speak English.

Literacy

Many farm dwellers have low levels of literacy, and are often embarrassed by not being able to write, though many have a basic level of functional reading. Therefore, all communications were verbal -- respondents were not required to sign anything or write anything.

Research Tools

Interviews

We used semi-structured questionnaires which were completed by the community researchers during their interviews. We interviewed people on 182 farms in the Eden and Overberg districts, and spoke to 555 farm residents, 33 farm management and 61 service providers (N=61). We did open-ended interviews with sixteen key informants in strategic structural positions. These were tape recorded and transcribed, as some of the respondents were high profile public figures who did not have anonymity, and we needed them to 'sign off' the text we would use in the research.

Interviews were mostly conducted in a person's mother tongue,[14] unless they chose to speak a different language. No translations were made of raw interviews – the data was entered into the database in the original language. However, for the final report,

14. Only three respondents who were speakers of African languages other than isiXhosa were obliged to speak in a second language.

quotes used were translated next to the original text. (See discussion of multi-lingualism below).

Case studies

The interviews produced 64 case studies of experiences with HIV/AIDS by farm dwellers and management. These were recorded on 'incident sheets' as part of the questionnaire by the interviewer. One person could complete more than one type of incident sheet for direct experience of someone who is HIV-positive: personal acquaintance; family member; self.

Focus groups

We held 19 focus groups with farm residents, 1 focus group with farm management and 21 focus groups with service providers. A further two focus groups were held with stakeholders in the service sector, and two with stakeholders among farmer organisations. Respondents who were interviewed were invited to the focus groups. Interviews were conducted well before the focus groups were arranged, in order that a hegemony of 'politically correct answers' was not created to influence what respondents said in their interviews.

The focus groups all followed the same basic structure: problem identification around HIV/AIDS; prioritisation of problems; solutions to high priority problems (in small groups). Two facilitators were allocated to each group: one to conduct the workshop, and the other to co-facilitate. Each community researcher conducted one workshop, while his/her partner co-facilitated, and then they reversed roles in the other one. The facilitator had the responsibility of filling in the focus group report, detailing the area and type of focus group, and the sex and mother tongue of participants, as well as a record of the proceedings from the flipcharts used during the workshop. We also had the back-up notes of the co-facilitator who not only recording the proceedings, but commented on the atmosphere in the workshop. We had hoped to tape record all the groups, but the costs exceeded our budget. However, the four stakeholder groups were tape recorded and transcribed.

Field notes

Field notes from community researchers were completed for each questionnaire and focus group, as well as by the research team members who interviewed the key informants.

Data Analysis

We had captured an enormous amount of qualitative information. In action research where respect for diversity must be maintained, care must be taken not to smooth over differences, but to retain the textures which necessarily reside in such a large dataset.

Though we had hoped to afford *QSR Nvivo* for Computer Assisted Qualitative Data Analysis (CAQDAS) the costs (product and training of staff) were prohibitive to our

budget. Therefore, together with our database manager we designed a custom-made database in *MSAccess*. All our information was captured into this relational database.

We used quantitative information to give us demographic profiles of our respondents, and to provide a descriptive context for reading the qualitative information.

Qualitative analysis as elucidated by De Wet and Erasmus (2005) was used for encoding the answers. Qualitative data need to be analysed with a great deal of sensitivity to context. In South Africa, multilingualism and diversity are challenges since respondents come from a variety of cultural backgrounds. Responses were mainly in two languages, Afrikaans and isiXhosa, and the coding was done in English i.e. both languages were translated. Answers were first coded into themes on two levels, from which frequencies were extracted, and then aggregated a second time under common categories. The Afrikaans speaking researcher worked with the Xhosa speaking database designer to establishing intercoder reliability.

Development of themes

- development of themes in English from the responses in Afrikaans and isiXhosa
- checking cross-cultural applicability of themes in three languages (intercoder reliability)
- encoding of responses according to themes into two different levels
- development of frequency tables for displaying distribution of themes and deduction of relationships
- aggregation and development of new categories on basis of patterns and groupings of themes
- revision, conclusions and verification
- development of searches which could extract coded texts from the database.

The findings were presented with illustrations of quotes extracted by the searches based on the coded texts. Quotes were referenced by unique identification numbers and prefixes to denote whether they were from farm residents, farm management, service providers or focus groups.

The Project Team

The project was managed by CRLS, and the research conducted by a consultant, Mikki van Zyl of Simply Said and Done, with a sub-contractor Luyanda Kota as the database designer from Ideal Ideas.

The Coordinating Team

The staff of CRLS: director, operations manager, project leader Overberg, project leader Eden, data capturer, general administration, general finances; Consultants: research coordinator database designer and manager.

Roles and Responsibilities

CRLS managed the budget for the project. The director and operations manager ensured that the study fulfilled the criteria for the overall project. The project leaders coordinated the logistics of the research and research teams in the two areas. The operations manager, research coordinator and project leaders did the interviews with key informants. Transcriptions of key interviews were generally done by the person who had conducted the interview, but they were very uneven, and it is highly recommended that a solution be found to ensure adequate standards.

The research coordinator was responsible for the overall research design including: coordinating the training, writing of training modules for community researchers; questionnaire design, focus group structures; translation of any documents from / into Afrikaans / English; quality control of data received, feedback to interviewers; analysis and interpretation of data; presentations of preliminary data to stakeholders; evaluations of the research; writing a comprehensive final report giving an overview of the current theoretical context for the research, and presenting the findings of this study.

The database designer designed and managed the custom-made database for the project in MSAccess, trained and acted as mentor for the data capturer. Together with the research coordinator they encoded the data, developed strategies for retrieving data and did numerical analyses and presentations as required.

Although a dedicated research administrator was envisaged, budgetary constraints prevented this appointment, which was much lamented by most of the team members in their evaluations. This person was supposed to, in consultation with the coordinating team, plan and execute the day to day running of the office for the research – like overseeing printing, sourcing of research materials, venue bookings, travel arrangements, equipment management, dealing with outsourcing matters, controlling data entry, basic bookkeeping and communications etc. Since this was only one of the many projects handled by the general administrator, project business did not get the priorities required to meet deadlines, and caused much frustration in such a big team where a domino effect was easily set in motion.

Interviewers

A team of 27 bilingual interviewers/focus group facilitators were appointed to conduct the interviews and hold the focus groups. There was one male and seven female Xhosa speakers, and 7 male and 12 female Afrikaans speakers.

It was compulsory that they attend the full five-day training course. They also attended a day workshop of evaluation and advocacy planning after the research had been completed. They were responsible for completing interviews and focus groups satisfactorily and according to conditions stipulated in their contracts. They completed field notes during the interviewing process, and kept notes of the outcomes of the workshops.

Interviewers were selected because they were based in an organisation – whether as a volunteer or paid worker – working locally with HIV/AIDS. This was strategic in

relation to accountability, capacity building and that they could remain in subsequent contact with the respondents.

The criteria for selection were: having a basic understanding of HIV/AIDS and lay counselling skills, or having been involved in research around HIV/AIDS; speaking English and one other local (Western Cape) language fluently; having access to transport to get to farms.

Each was required to do a minimum of twelve (12) interviews with farm residents, one with farm management and two with service providers in their area. They were required to facilitate one focus group, either with farm workers or with service providers, and be a co-facilitator for one other focus group. Interviewers were sorted into teams of two or more working together, and we tried to match them for sex and language diversity.

The training covered:

- identity (diversity), culture, stigma, sexuality, gender, gender based violence
- HIV/AIDS – impact on families, in SA, infection, transmission, protection, testing
- rights – privacy, confidentiality, labour
- counselling skills
- research: concepts, ethics, network of accountability, sampling, methods, questionnaires, interviewing, facilitation for focus groups
- research implementation.

At the end of the research a one-day evaluation was done with the team.

Implementation

Duration

The research study took ten months to complete: the process started in mid-February 2005, and was completed in mid-December 2005.
The research phases were as follows:

Phase 1 (Feb–March) **planning**: research design, tools design, training course development; development of administrative tools; selection of interviewers etc.

Phase 2 (April–July) **implementation**: training; monitoring research; data capture and entry; ongoing research tasks;

Phase 3 (July–October) **preliminary findings**: data analysis, presentation to stakeholder focus groups; research process evaluation by interviewers;

Phase 4 (November–December) **report**: interpretation of findings; recommendations.

Communication

Fortnightly meetings were held with the coordinating team to plan, implement and monitor progress. Regular phone calls and email contact were the main forms of communication between the team members.

The database designer and research coordinator worked in separate places in Cape Town, but frequently spent many days working together, and communicating regularly by telephone. They were both accessible on the 'phone, and kept in regular contact with CRLS's office in Stellenbosch by telephone or email. The research administration was supervised by the operations manager, project leaders and research coordinator. Interviewers were invited to contact the coordinating team whenever they needed to.

Pilot study

The questionnaires were piloted by the research coordinator, operations manager and project leader of the Overberg in both languages with respondents of both sexes. After adjustments were made, the questionnaires were finalised.

Summary

The Research Design is a complex process, encompassing the development of a vision, putting it into a concrete plan, and working out the logistics of the project. What frequently remains invisible in project proposals, and often is unaccounted for in the planning, is the amount of time and resources taken up with practicalities: writing letters of invitation, organising venues, setting criteria for community researcher selections, doing the selections, processing claims for transport and communications ... the list is endless, and the only way it works is through ongoing communication and cooperation. Having a detailed plan and vision for the process which is shared by everyone is extremely important. Besides, it is almost axiomatic to say that the plan **will** change along the way because 'real life' demands it. But, every person on the team must be included along the way.

In the next chapter I discuss the ethical issues around the project in more depth.

chapter four

Ethics on the ground

The ethics bound up in the implementation of feminist research methodologies, and dealing with 'sensitive' issues such as sexuality and HIV/AIDS and multi-lingualism are discussed in chapter four. I also touch on the ethics relating to how a team works together.

The Foundation

> The researcher must constantly be aware of how her values, attitudes and perceptions are influencing the research process, from the formation of the research questions, through the data collection stage, to the ways in which the data are analysed and theoretically explained (Abbott & Wallace 1990:27).

Malestream social science adopts a relationship of 'othering' towards the 'objects' of research. This outward vision which puts the researcher outside the frame is addressed repeatedly by feminist researchers who insist that the researcher is *always inside the frame* (see Reinharz 1983:168-69 for alternative model). Therefore, the relationships between researcher and researched have been problematised, as well as the relationships between the researcher and the study field (Breuer, Mruck & Roth 2002).

But what if 'the researcher' consists of a team? And what of the ethics in the relationships between them? We are familiar with the ways in which malestream researchers often present themselves as the sole producers of the product. Amongst most feminists it is *de rigueur* that one thanks and acknowledges other contributors – i.e. makes their labour visible, yet few include the relationships with them as part of their discussions of reflexivity. I propose that a perspective of human rights and diversity is needed also to unpack and evaluate these relationships and their impact on the research outcomes.

Reflexivity

The concept of reflexivity was not invented by feminists, but emerged in relation to the study of knowledge, and specifically the impact the researcher has on the field of study

and its outcomes. The tenet that 'the personal is political' which was widely adopted by feminists affirmed experiential analysis and challenged the academic myth of value neutrality. In elucidating a feminist epistemology Harding (1987) demonstrated how research was male-centred, thereby unveiling how patriarchal ideologies were being normalised through research. The theoretical impact of 'putting the researcher in the frame' opened ways to cultural sensitive analyses. Reflexivity was the bridge between the two frames of producing meanings – between the product and the research activity (Gouldner 1971:494). These ideas had profound effects on theorising the research process itself: it decentred the researcher as a single authoritative voice by relativising knowledge and opening the space for making research processes more sensitive to context. Secondly it implied that research could – and among feminists *should* – be used in social transformation. It also placed an onus on researchers to be more accountable and democratic in their work. Moreover, since the place of research was increasingly regarded as spreading beyond the academic milieu, and moved into the domain of activism, it also opened the way for research to be written or produced in more creative and accessible formats, inevitably contributing to the popularisation of intellectual discourse.

What is reflexivity?

Reflexivity is a practice of continually glancing in the mirror: a subjective process of self-conscious evaluation of the research process as it is practised, and its impact on the information which is gathered. Therefore we are bound to investigate how our involvement with a project informs and influences the outcomes of the research.

Reflexivity can be separated into two levels. 'Personal reflexivity' or the reflecting of the researcher or research team (as is the case for the HIV/AIDS on farms study) – 'upon the ways in which our own values, experiences, interests, beliefs, political commitments, wider aims in life and social identities have shaped the research' (Willig 2001:10), and how it has shaped us. The second level is 'epistemological reflexivity' which concerns how the research design has limited or excluded possible information, and how it may have been different with a different design e.g. not having quotas for women and men. Academic critiques of research are often focused on the epistemological aspects. For instance, feminist research has shown how gender agglomerated knowledge cannot address gender-specific issues.

There is not sufficient space here systematically to address the different levels for the whole research project. Rather, by using various conceptual issues to anchor my discussion, I will identify the relevant levels as I write and ask questions about the possible impacts on the research outcomes.

Team Identities

All the team members were to varying degrees activists. The director, the operations manager and the two project leaders were all 'old strugglers' – activists dating back to the anti-apartheid struggle. Subsequent to democratisation, we all became involved in different ways with reconstruction and development in the rural areas, with a key focus

on land reform. We all had historical relationships to NGOs and communities, as well as being part of informal and formal networks with other NGOs. We drew unapologetically on these relationships – in fact, relied on them – to access people and information for the research. (These relationships work both ways). In particular, CRLS had long been working with an NGO partner in the Southern Cape, the Southern Cape Land Committee (SCLC) on various other projects. The research coordinator, through CRLS, had also worked with them, but also had an independent history with them through other work. Therefore some of us had known each other personally for a long time, but we all knew someone who knew someone ... Our identities as activists (Zegeye 2001:333), specifically activists involved in 'rural transformation', gave us access to certain networks and information. The other members of the coordinating team did not identify as 'activists', either through age (being too young to have been involved in 'the struggle') or (dis)inclination.

The structural identifications of the team were also reasonably diverse. The research coordinator (Mikki van Zyl) is a white middle-aged woman from an Afrikaans-speaking background. The operations manager and database designer are Xhosa-speaking men, while the director is a coloured woman, and the project leaders were coloured – one man and one woman (a young coloured woman activist has subsequently taken over from the man) – all from Afrikaans-speaking backgrounds. As employed people we fell in the range of middle-class South Africans economically and culturally.

All the community researchers were active in NGOs, and about a third were 'old strugglers'. Amongst the 27 community researchers there were seven female and one male Xhosa speakers, and six male and twelve female coloured Afrikaans speakers with one white male English speaker. All the team members were bilingual with English being the *lingua franca* in the research team. There was a range from old to young people. Some of the community researchers were not in employment, and were therefore closer to our respondents in experiencing poverty, while others were middle-class. However, they were all educated to matriculation level.

In terms of employment equity definitions therefore, the racial and sexual identities of people in the team was predominantly black with black people in top management positions, and women representing well over half the team, with the two highest coordinating positions occupied by women (director and research coordinator). Therefore the team was representative of Western Cape rural demographics, and more generally of transformation towards diversity in South Africa. It was also reasonably well-matched in terms of race and sex with our farm dweller respondents, but not in terms of class positions. The service providers were mixed sex and race, but the farm management profile was predominantly white. But as they were not our primary target group we were not concerned with matching them. Besides, being in historically privileged positions, we assumed they would feel less compromised about saying 'the right thing'. (See chapter seven, Networks of Accountability for hierarchies and responsibilities).

Research team

Standing (back): Mzukisi Mooi (operations manager), Luyanda Kota (database designer), Julia Snoek, driver, Sharon May, Mikki van Zyl (research coordinator) Trevor Titus, Paul Findley (project leader, Overberg); Standing (front): Nikelwa Manyube, Thandeka Mlumbi, Xoliswa Machoni, Susan Jacobus, Ragel Korkee, Daphne Valentine, Esther Tshandu, Christine May, Jacoline Muller, Dawn Zana, Phillip Meiring, Maureen Appel, Susan Siegelaar Crouching (middle): Louise Mouries, Gordon Mackenzie; Second row: Mina Claasens, Clive Pretorius, Alvin du Preez, Anthony Ewerts, Roy Ngxanga, Leslie Ruiters; Front row: Florina Johnson, Cathy Jackson (project leader, Eden). Absent: Gladys Libazi, Mariaan Fiekies.

Relationships with Respondents

> If the research problem is of interest to the researched, they will be more likely to invest the time and energy to collaborate (Lentin 1994).

The HIV/AIDS pandemic has been topical for most civil society organisations working on development. In South Africa, the issue has been the subject of hot debate. The President's 'Aids-denialism' and Health Minister's 'natural cures' have created great controversies. Stephen Lewis, United Nations envoy to Africa on HIV/AIDS, lambasted the South African government for its irresponsible stance on HIV/AIDS at the Sixteenth International Aids Conference held in Toronto, August 2006 (Blandy 2006). This was an

international vindication on the position adopted by the majority of NGOs (and many individuals in government too) working on HIV/AIDS in the country.

Through their work with farm workers and other NGOs in the region, CRLS had knowledge and experience of workers' issues. There was an increasing demand from organisations and workers to address HIV/AIDS issues. There had been requests for training on HIV/AIDS and human rights, and a training manual had been written.[15] However, to secure funding for the HIV/AIDS training programmes in an environment where funding is highly competitive, CRLS needed some reliable information about HIV/AIDS and farm workers. They raised money for the project from an international humanitarian funder, and locally from the South African wine industry.

Establishing Trust

In 'experiential analysis', the people who form the 'subjects' in the research are not chosen at random, but are accessed by tapping into networks and communities where one's trustworthiness as a researcher has been established in the eyes of the subjects (Reinharz 1983:176). In the case of this research, the community researchers might not have been known personally, but their organisations would have been known – e.g. local advice offices or development projects. In this way, workers from organisations also had an opportunity to make contact with existing or new clients. But the community researchers also had to establish their credibility with the farmers or farm management in order to enter the property, and conduct interviews with the residents on the farms.

Access to farms

The community researchers were all issued with identity tags with their photographs and letters of introduction on the CRLS letterhead identifying the researchers. These explained the aims of the research, their purpose and requesting entry to the farms. Only one community researcher reported difficulties in gaining entry to farms – 'bad attitudes from farmers'. However, he dealt with it – 'remained calm and confronted them'. We also required at least two interviews with farmers in each municipal district. Other community researchers were wary because of previous experiences of adversarial interactions when dealing with labour issues.

> 'n Absolute elewyse boer. Heelpad hamer hy op drank en armoede as die probleem [*A totally bullish farmer. The whole time he was stuck on drink and poverty as the problem*] (Fieldnotes FM 174).

But most of them found the management to be reasonable to friendly.

> This farm manager has a fair knowledge of HIV/Aids. He is eager to call us in to continue the programme to enlighten the workers as well as management (Fieldnotes FM 145).

15. Van Zyl, Mikki (2004) *Living with HIV/AIDS: Training for farm workers, A Manual for Facilitators* and *Saamleef met MIV/VIGS: Opleiding vir plaaswerkers,'n Handleiding vir fasiliteerders*. Stellenbosch: Centre for Rural Legal Studies.

> Ek is vriendelik ontvang en die onderhoud het in 'n aangename trant verloop. Na afloop van die onderhoud het hy die hoop uitgespreek dat ons sy werkers moet kom inligting gee, alles rondom MIV/Vigs. Ek het die uitnodiging aanvaar [*I was warmly received and the interview progressed in a pleasant manner. After the interview he expressed the hope that we would come and give information to his workers, everything about HIV/Aids. I accepted the invitation*] (Fieldnotes FM 457).

Some of the team found this surprising, as their experiences as black researchers talking to white farmers was new – 'to have access to certain farms where black people didn't have access to and meet the farm residents' (Team evaluation of research process). Personally I did not find this so surprising. Having family who are still farmers, I had had a few conversations with them, and how concerned they were about HIV/AIDS. Addressing HIV/AIDS is more likely to be perceived as 'in their interests' than labour issues. I saw this as a strategic opportunity to get access to farms to do more general human rights education with farm dwellers. This view was also taken up as the fourth highest priority in the George Stakeholder Forum: 'Targeting of farmer unions'. Their rationale was as follows: 'They can influence farmers; Influence workers; Create an attitude change; Issues can be sidetracked in association, therefore approach in positive way to show benefits for farmers' (SH George).

Interviewing relationship

There is a large differential in power between employers and employees on farms, especially where they live on the farm in accommodation provided by the owner. On many farms a culture of paternalism remains from the apartheid era, maintained both by the owners and the residents. Many farmers take the 'moral high ground' in relation to their workers, and set the 'tone' for how the residents should respond to issues. Farm dwellers would know that interviewers needed permission from management to come onto farmers' lands. Therefore they may have felt pressured to complete interviews because they felt the manager's consent for the research may represent an 'obligation' to comply. This would undoubtedly vary depending on the type of relationship between the employer and residents, and the quality of communication between them. There was no certain way for us to know or check this. We had to trust that the respondents would exercise their agency and refuse an interview if they did not want to do one. For example in one case the interviewer noted at the end of the interview to which the person had consented:

> Bietjie ongemaklik voorgekom [*appeared slightly uneasy*] (Fieldnotes FR 163).

Some farmers only allowed interviews to take place during the workers' lunch-breaks, and the interviewer came under time pressure. In some cases the interviews were not completed, or hurried. Others, for unexplained reasons became uncooperative during the course of the interview, but did not choose to stop it altogether.

> Begin was gemaklik, maar hoe verder hoe stomper die antwoorde [*The beginning was comfortable, but the further we progressed the briefer the answers became*] (Fieldnotes FR 645).

One interviewer debated whether to stop the interview, but decided to proceed. Fortunately the majority of responses from interviewers were positive, feeling they had sparked an interest or provided valuable information to the interviewee.

> Voluit gepraat tot ons klaar is [*Spoke enthusiastically until we had finished*] (Fieldnotes FR 563).

There are further power complications in the relationships between farm residents and interviewers, since the interviewers were recruited from service providers in the area. The interviewers could therefore be perceived to provide access to scarce resources and farm dwellers might want to 'please' the interviewers with answers they think the interviewers want to hear.

> Sy was ook bang dat sy kan verkeerd praat [*She was scared of saying the wrong thing*] (Fieldnotes FR 45).

Respondents were being interviewed about issues about which they knew little. In these situations, interviewers needed to be sensitive not to make people feel stupid, and very disciplined in not 'feeding' the respondents answers to questions. The interviewers were encouraged to answer questions by respondents, but only after the question had been asked, so that the respondents could speak for themselves.

> Sy het baie vrae gevra. Het haar ook ingelig oor toetsing, oordrag ens. [*She asked many questions. Also informed her about testing, transmission etc.*] (Fieldnotes FR 394).

By providing opportunities for the respondents to ask questions, we were given the chance to find out what was meaningful to them (Reinharz 1983:177). Their concerns were recorded in the last field, to the open-ended question, 'Is there anything more you want to say or ask?'. In this way we opened the research to include issues that were not necessarily addressed in our questionnaire.

> Ek sou graag wil klem lê op werkskepping, want armoede laat mense meer drink uit moedeloosheid en sodoende slaap hulle meer rond. Baie het seks omdat hulle kos of betaling daarvoor ontvang. Opleiding is ook 'n dringende behoefte op plase [*I would like to emphasise job creation, because poverty makes people drink more out of hopelessness and therefore they sleep around more. Many have sex because they get food or payment for it. Training is also a great need on farms*] (FR 196).

> Hayi andinanto yakuthetha, kodwa sicela uncedo, kuba sihlala endaweni emdaka apha emaplazini [*No, I have nothing more to say. But we need help because we live in poverty here on the farms*] (FR 613).

> Die boeke oor MIV/VIGS is meer in Engels. Hulle moet meer in Afrikaans vertaal word, sodat ons dit kan verstaan [*The books about HIV/AIDS are mostly in English. They need to be translated into Afrikaans so that we can understand*] (FR 214).

Information about the research

Part of the 'patter' of introductions to the interview included information about the purpose of the research, the composition of the research team, and the use of the envisaged final report.

Extract: Core questionnaire

SOU U VERKIES OM AFRIKAANS TE PRAAT?
INGABA UFUNA UKUTHETHA ISIXHOSA NA?

Read the Introduction out loud to your respondent

Introduction

I am working with CRLS in a research project about HIV/AIDS. This study is about HIV/AIDS on farms. We want to ask farm residents what should be done about HIV/AIDS in their communities, so we can start doing something about HIV/AIDS on farms.

We want to ask you some questions:

- about who you are
- what you know about HIV/AIDS and where you learnt it
- about other people's experiences of HIV/AIDS as well as your own
- about HIV/AIDS and the workplace
- about caring for people who are HIV positive
- about the services available and how they can be improved
- and finally, we will ask you for your ideas on what can be done to help people affected by HIV/AIDS.

At a later time you will be part of a focus group where we will discuss these ideas further. We thank you for speaking to us. We want you to know that your name will not be written down anywhere. Please remember that you do not have to answer any of the questions if you do not want to. You can also stop me at any time to ask questions.

Are you happy for us to begin? YES / NO

During the interview, if someone wants to know more about something, like how HIV works, or about transmission or their rights, take time to tell them.

Time was given for questions to be asked and answered and for the person to make comments about the research project before they were asked to consent to giving the interview. Interviewers were encouraged to answer questions from respondents.

> Die onderhoud het goed afgeloop. Vrae is gevra tydens die onderhoud. Antwoorde is gegee, dit het regtig goed verloop [*The interview went off well. Questions were asked during the interview. Answers were provided, it really went off* well] (Fieldnotes FR 482).

Consent

Each respondent was asked for their verbal consent to be interviewed. Interviewers were required to check the appropriate box on the questionnaire to confirm that the respondent had consented. We did not ask respondents to **sign** consent forms as 33% of farm residents have no schooling (PAETA Aids Strategy), and many cannot write. Respondents were told that they could refuse to answer questions, or terminate the

interview at any time. However, from interviewers' fieldnotes, we realised that some stayed out of politeness, though they were rushed for time. In some cases interviewers noted that answers became abrupt after a certain topic had been raised e.g. sexual violence.

> Persoon is nie bang vir praat nie. Vra uit sy eie uit vrae [*This person is not scared of talking. Asks questions spontaneously*] (Fieldnotes FR 224).

We did not have consent forms signed in the focus groups, as we assumed that people consented with their feet – they would not have come to the focus groups if they did not want to participate.

Anonymity and confidentiality

Except for key informants and stakeholder groups, the interviews and focus groups were anonymous. Respondents' names were not recorded, but clearly, the community researchers would know them – and they were bound by confidentiality in their work contracts.

> Respondent wou aanvanklik nie deelneem nie omdat sy bang was haar naam sal genoem word. Nadat ek haar gerus gestel het, het sy ingestem [*Respondent initially did not want to participate because she was scared her name would be mentioned. After I reassured her, she agreed*] (Fieldnotes FR 55).

Participants in the focus groups were also assured of anonymity as their names were not to be recorded in the notes facilitators took in the workshops. In the stakeholder forums where audiotapes were made, the tapes are available only to the research team members who are bound by confidentiality.

Tape recordings of key interviews were transcribed and sent to the informant for 'correction' or editing. They signed consent and release forms for the information to be used in the research report.

Giving something back

Not only were interviewers encouraged to share information about HIV/AIDS, but we had also equipped our community researchers with pamphlets and condoms to hand to the respondents. They also had lists of names and numbers of local service providers if they should require referrals.

> Die was gemaklik maar baie lank. Geduld was die wagwoord. Hy het sommer begin met vrae. Ek het hom noukeurig ingelig sover ek kon. Waar ek nie kon nie het ek genoem dat ek terugkom vir 'n fokusgroep en meer inligtng sal dra. Het inligting boeke wat ek byderhand gehad het vir hom gegee. Dit was 'n lang dag sonder ete vanaf 8h00 vm tot 17h00 nm. Nou is ek poot uit [*It was comfortable but very long. Patience was the watchword. He kicked off with questions. I informed him as carefully as I could. Where I couldn't I mentioned that we would come back for a focus group and I would have more information. Gave him the information pamphlets I had one me. It was a long day without lunch from 8h00 to 17hoo. Now I am dog tired*] (Fieldnotes FR 355).

> Baie begerig om te wil help. Gevra vir kondome om dit uit te deel. Is bekommerd oor plaasbewoners wat nie genoeg weet nie [*Very keen to help. Asked for condoms*

to distribute. Is worried about farm dwellers who don't know enough] (Fieldnotes FR 414).

On the farms, the farm residents are at the bottom of intersecting hierarchies in a general matrix of power, choice and agency made up of relationships to their employer, to the educated workers from service providers, as well as amongst themselves. Those with permanent jobs, mostly men, are more secure than those with seasonal and piecework, or no jobs at all. Prevailing heteronormative gender ideologies determine that men are allocated the housing, making women's security more tenuous through their dependency on men. The history of apartheid's coloured preference area[16] in the Western Cape means a dominant coloured culture prevails on farms, and tends to marginalise isiXhosa speakers who are mostly in the minority, or stay there temporarily while doing seasonal work. Therefore the dominant culture among residents is coloured, Afrikaans-speaking and will also be determined also by what the farmer 'allows' e.g. attitudes alcohol and domestic violence.

> Niks op my plaas, ek laat nie drank toe nie [*Nothing on my farm, I don't allow alcohol*] (FM 174).

The 'duty of care'

When one shifts the perspective of research from an instrumental one to one of social relationships embedded in inequalities, the feminist action researcher is also bound to a duty of care to the participants in the research. This emerges logically out of two epistemological assumptions underlying action research: *ubuntu* and holism – an assumption of our human relationality through sharing intersubjective realities and interdependencies; and following from that, our partisanship in doing the research.

An 'ethics of care' has been extensively theorised in discourses on feminist ethics. Gilligan (1982) contrasted it to the 'ethics of justice' proposed in rationalist paradigms. She asserted that and ethic of caring was based on people's sense of connectedness to one another, and that it developed in the context of experience. It is characterised by nurturing and a sense of responsibility to others. These are the principles underlying feminist research ethics (see Reinharz 1983:176).

The emphasis on a 'duty of care' in research has been debated mostly from within the health sciences arena as bioethics and the protection of human subjects against abuse in research. Bioethics concerned with 'rational' science, and fills the 'emotional' gap with legalistic, contractual guidelines. Bioethics ignores the social, emotional and structural factors impinging on individuals and groups. However, these are factors that are fundamental to both qualitative research and nursing practice (Dill 1995). In contrast, the feminist theorisation of an ethics of care has posited it more coherently as an alternative to justice while some (Richards & Schwarz 2002) say it includes justice.

16. Apartheid racist policies determined that coloured people should be given preference in job allocations.

In feminist research, the power of the researcher is implicitly recognised, and a variety of guidelines established to care for participants (see Research Triangle Institute 2005). As a feminist action researcher I cannot be blinded by idealism to what I know from the paradigm, that we are in relations of power with others, and through reflexivity should determine how that power plays out to influence the outcomes – both intended **and unintended** – of the research. Therefore I propose that one of the ethical tenets included for reflexivity in action research should be a 'duty of care'. Plow (1998) mentions it as part of 'partisanship' and 'accountability', but unless it becomes formalised – as in a 'network of accountability' it can easily slip between the floorboards.

Intersubjectivity

'Malestream' interviews, as described in mainstream methodology textbooks, are seen as mechanical data-collection instruments in which one person asks the questions, another answers. Interviewees are characterised as passive and interviewers are reduced to a question asking and rapport promoting role. The classical sociological interview rejects emotion and prohibits researchers from getting involved with their interviewees. Oakley proposes a different paradigm for interviewing women. She regards the interview as one way of giving women greater visibility, not only in sociology, but also in society, by documenting people's own accounts of their lives (Oakley 1981: 41-9).

As concepts asserted in action research we affirm that the ethics of intersubjectivity encompass: respect for diversity; a duty of care; our accountability to one another; taking responsibility for the outcomes; activism. In all these, the process of reflexivity must acknowledge the intersections of power, and how they contribute to (or stifle) the agency of marginalised people.

Who speaks to whom about what

Sexualities and HIV/AIDS are both subjects which are intimate, and not easily spoken about. Therefore interviewers need to establish trusting relationships with respondents, and exercise the utmost discretion while conducting the interviews. This implies finding a space to talk **when the interview begins**, where one would not be disturbed or interrupted. It also implies that the interviewers should allocate enough time to the process, for the interview to be completed satisfactorily.

We tried to match respondents to interviewers of their own sex and cultural group, and who spoke their mother tongue (though some chose otherwise). Often women will not talk to men about gender-based violence or sexual assault. The intersection of HIV/AIDS, sexuality and gender-based violence alerted us to the possibility of information being withheld from the 'wrong' interviewer. We also know that it is easier to speak about 'things of the heart' i.e. close to one's emotions – hurt, joy, pain – in one's mother tongue. We knew we were entering sensitive areas of people's lives which are fraught with emotion, with stigmatised topics like HIV/AIDS or private business like sexualities, and cautioned the interviewers to approach it gently.

Further, we designed the interview schedule in such as way to follow an emotional curve: starting with information that is likely to be uncontroversial or painful like

biographical details about jobs, and gradually moving to more personal issues, i.e. health. The questions tended to require a logical 'yes' / 'no' type of response, followed by an open-ended question which would allow the respondent to add their own explanations or details. The questionnaires ended with outward-looking questions concerning activism, and an appeal to their agency.

Sexual secrets

> Die persoon praat openlik, alhoewel toe ek by die vraag gekom het of sy iemand ken wat moontlik geraak is deur MIV/Vigs, het sy stil geword het en wou nie verder daaroor praat nie [*The person spoke freely, although, when I came to question about whether she knew anyone who had been affected by HIV/Aids, she became quiet, and did not want to talk any more about it*] (Fieldnotes FR 179).

We had clustered HIV/AIDS in general questions regarding health, also in order to explore the way in which residents framed the link between TB and HIV. There is a myth doing the rounds in the Western Cape which pronounces that coloured people get TB while black people get HIV. Connected to the general health questions we also began to introduce gender disaggregated questions e.g. 'Is it different for women and men?' This set a pattern for the questions where gender disaggregation became significant.

The manner in which sexuality is expressed in language is important. For example, it would not be consistent with our ethics to use stereotypes of sexism or racism, however colloquial it may be – a theoretical awareness of how language perpetuates inequalities requires a self-conscious praxis in the research that will not elicit or support the use of stereotypes. Similarly, language that confirm women's status as 'victims' should be avoided.

The community researchers came from different organisations with different agendas, and are no less subject to myths and stereotypes than you or I. Therefore, part of the capacity-building training course presented for community researchers included training on sexuality and HIV/AIDS issues. In research which is investigating sensitive issues like sexuality, it is the interviewer's responsibility to be sensitive towards culture around these issues, e.g. polygyny in African cultures.

Talking about sexuality

HIV/AIDS research is riddled with obstacles due to the stigmatisation of the epidemic, not least by our own government. There are major power imbalances between employers and employees on farms, especially where they live on the farm. If a worker becomes ill, it feeds into fears of dismissal, and loss of home and community, effectively driving any knowledge related to HIV underground.

> Hou elke keer haar hand voor die mond as sekere vrae gevra word. Ietwat skaam oor haar onkundigheid [*Keeps her hand in front of her mouth every time when certain questions are asked. Shy about her ignorance*] (Fieldnotes FR 160).

> Sy was bale skaam om die vrae te beantwoord. Sê sy gebruik iets vir beskerming, maar wil nie sê wat dit is nie. Maar verder het dit goed gegaan [*She was shy to*

answer the questions. She says she uses something for protection, but won't say what. But otherwise, things went well] (Fieldnotes FR 341)

Talking about HIV/AIDS

Talking about HIV/AIDS could elicit painful experiences, therefore all interviewers were trained in basic lay HIV/AIDS counselling skills to cope with this eventuality. The interviewers were equipped with suitable information and materials (as well as condoms and femidoms) for the respondents. They were also required to know what referrals were available to farm residents before they went to the farms. In a climate which is fraught with stigmatisation it is also important that people are assured that their names will not be revealed to anyone.

> Was ook baie skaam om oor die onderwerp te gesels. Die mansvriend van haar het by die 12de vraag sommer uitgestap en wou glad nie deelneem aan die verrigtinge. Mens weet nie wat om daarvan te maak nie, maar dit wil voorkom asof daar mense is wat skerm wanneer dit by MIV/Vigs kom. Miskien is dit onkunde. Het wel so 'n bietjie inligting verskaf om 'n lig te werp op die onderwerp [*Was also shy to speak about the subject. The boyfriend of hers walked out at the 12th question* (about HIV/AIDS) *and wouldn't participate in the events. One doesn't know how to interpret is, but it seems people are hiding things when it comes to HIV/Aids. Perhaps it is ignorance. In any case tried to throw some light on the subject*] (Fieldnotes FR 103).

One interviewer recognises how a respondent sidesteps talking about it.

> Tannie was 'n bietjie nors en oneerlik, want sy systap die vrae {*Auntie was a bit grumpy and dishonest, because she side-stepped the questions*] (Fieldnotes FR 382).

Another kept quiet about it.

> Die persoon wil nie baie praat nie ... Hy hou nie daarvan om oor Hiv/Aids te praat nie [*This person did not talk a lot ... He doesn't like talking about HIV/Aids*] (Fieldnotes FR 299).

Though people might be polite, they will exercise agency in whatever way they can. But are we morally justified in asking them these types of 'embarrassing' questions?

Stigmatisation

Due to the stigmatisation of the epidemic (not least by our own government), people might feel 'marked' for the gossip mill by being interviewed on HIV/AIDS. Stigmatisation feeds off fears of dismissal, and loss of home and community, thereby effectively driving any knowledge related to HIV/AIDS underground.

> Aan die begin was sy eers baie skaam, bang en senuweeagtig om te praat. Het aangeraak sy is bevrees, want haar niggie het twee weke gelede gesterf aan Vigs en sy was nie eintlik betrokke by sieke. Ek moet geen melding maak dat sy die geval genoem het nie. Die familie het dit nie met ander in die gemeenskap bespreek nie. Sy is ook bang dat mense die familie se menswaardigheid verder kan afkraak. Kliënt is ingelig oor Vigs. Sy is ook baie opgewonde om deel uit te maak van opleiding rondom MIV/Vigs [*At first she was very shy, scared and nervous to talk. Discovered she is fearful because her cousin/niece died two weeks ago of Aids,*

and she was not really involved with the sick person. She asked me not to mention that she told me about the incident. The family has not discussed it with the rest of the community. She also fears that they will undermine the family's dignity further. The client is informed about Aids. She is also excited to be part of the training around HIV/Aids] (Fieldnotes FR 46).

By speaking to people on the farms about HIV/AIDS, we opened a conversation about it, and shifted a step away from the rumours and secrecy. Using a holistic and context-based approach to the problems, we asked people at all levels and in various sectors (workers, dwellers, farmers, service personnel) about their perceptions and experiences of HIV/AIDS in the farm working context. But more than that, we asked for their ideas in solving problems, and opened avenues for them to get information.

> Aan die begin was dit baie moeilik. Die kliënt was baie ongemaklik en het nie geweet woor die proses gaan nie ... Ek het vir die kliënt verduidelik totdat sy verstaan het. Sy het later moed geskep om vrae te vra. Kliënt het ook genoem dat sy bang is, omdat baie mense jou slegte antwoorde gee as jy iets vra. Sy is ook oningelig - wil meer ondervinding opdoen. Sy is bereid om meer te leer [*At the beginning it was difficult. The client was uncomfortable and did not know what the process involved ... I explained until she understood. Later on she mustered the courage to ask questions. She also mentioned that she is scared, because many people give you bad answers when you ask something. She is also uninformed - will gain more experience. She is willing to learn more*] (Fieldnotes FR 45).

Accountability to respondents

Interviewers were recruited from service organisations in the regions to be surveyed so that there is a potentially ongoing relationship with respondents after the research process has been completed.

Capacity building

Interviewers were recruited from service organisations in the regions to be surveyed. They were given five days' obligatory training, where they learnt about gender and sexualities, HIV and lay counselling skills as well as research techniques and issues. The training was conducted with participatory methodologies, so learners had ample opportunity to practice with the tools. During the week after training, they were obliged to complete at least one farm dweller interview and one service provider interview, which were evaluated immediately and feedback provided to the interviewers.

Language

Mother-tongue

In a multi-lingual society such as ours, where people are easily marginalised according to their language and culture, we felt it necessary to affirm their identities by conducting the research in the language of their choice. Only in once case was there difficulty, as the person was from another language group in the country. (The other two spoke the local languages fluently, even though it was not their mother tongue). In 555 interviews only

three people did not have the choice of speaking in their mother tongue. About ten respondents preferred to speak in another language.

Focus Groups – disaggregation into small groups

In the focus groups, where there are disaggregated groups, small group facilitators will be matched in terms of sex, age and language to the respondents. Focus group coordinators need to have the respect of the participants, but must also have the necessary training to allow the workshop to proceed without the discourse being dominated by minority opinions.

Farm dweller culture

The dominant culture amongst farm dwellers is one of coloured Afrikaans-speakers. This sub-culture is embedded in the broader Afrikaner culture of the rural areas. Alcohol abuse is common on the farms, and I typify it as 'masculinist' culture (Van Zyl 2006b) which generates gender-based violence and exacerbates the spread of HIV/AIDS. The farm workers themselves confirmed it in the study, with 75% believing that more than half of the people on their farm abuse alcohol (Van Zyl 2006a:133). Farm dwellers in our study confirmed the link between alcohol abuse and gender-based violence, for both rape and wife battering (Van Zyl 2006a:131).

Multilingualism in the research report

To carry through the respect for language diversity, we retained the quotes used in the report in the original language of the interview, and provided translations alongside (like here). Throughout the research process, three languages were used. There was some criticism from the community researchers that the training manual was only available in English. It had been our intention from the start to translate the manual into Afrikaans and IsiXhosa, but due to the death of my mother two weeks before the training, I had to spend time with my family, and did not manage to complete the translations.

Relationships between Team Members

Ethics in logistics

The project leaders in the regions collected the interviews and checked them for completeness, and making sure that the quotas etc. were being met, and that mutually agreed deadlines were kept. The questionnaires were passed on to the researcher who read through each interview as soon as she received them, and initialled them if she considered them complete (all questions completed). This was also the approval for payment to the interviewer. If interviews were not adequate, the project leaders would have to contact the interviewers to complete the interview, after which the cycle of

checking and approval by the researcher would be repeated. Each interviewer would get a written review of the interviews they had completed from the researcher.

As soon as interviews had been approved, they were entered into the database by the data capturer. Once a week, the database was emailed to the researcher. After the primary data had been completely entered, the researcher and database designer 'cleaned it up', and added the fields that were used for coding. Analyses were done to extract the preliminary findings. These were presented in PowerPoint to the four stakeholder focus groups. Further interpretation preceded the final writing of this report. Interviewers were paid per interview completed (and approved) and after submitting a completed (and approved) focus group report for each group which they either facilitated or co-facilitated. They were also reimbursed for transport and phone costs according to a contractual arrangement with CRLS.

How would it have been different?

In the evaluation session we had with the community researchers after the research process had been completed, we asked them what they had learnt during the interview process.

LEARNINGS FROM DOING INTERVIEWING

What people learnt resonated with the information that emerged from various participants in the research: stigmatisation, lack of reliable knowledge about HIV/AIDS, relationships in workplace, need for support.

Stigma

- mense nie altyd eerlik / ontkenning (stigma) [*people not always honest / denial (stigma)*]
- wrong ideas – touch 'melaats' [leper] – be away, isolate youth – know something, learn at school, honger vir kennis [*hungry for knowledge*]
- euphemisms (not using the name): 'groot siekte' [*big illness*], 'groot hoes' [*big cough*], 'bobbejaan' [*baboon*], 'die Lotto' [*the Lotto*], 3Gs

Lack of knowledge

- onkunde – werkgewers sowel as werknemers [*ignorance – employers as much as employees*]
- nooit goed vanselfsprekend aanvaar – party mense weet regtig niks van MIV [*must never take stuff for granted – some people really know nothing about HIV*]
- weet nie hoe kry mens virus [*don't know how people get the virus*]

Language and literacy

- taal – pamflette in Engels – afgesny, ongeletterd [*language – pamphlets in English – cut off, illiterate*]

- Illiteracy – farmers just informing workers

Relations with people in power

- attitude of farmers (1960s)
- go to people and they don't know – being accepted
- beraders verduidelik nie behoorlik – tyd te min, no counselling happens [*counsellors don't explain properly – too little time ...*]
- no counselling before testing (VCT)
- people shy – some want to talk – most are shy
- build up confidence with interviewers / trust
- start talking – they are scared – then they get more willing to interact
- mansmense wil nie vrae beantwoord nie – bang – connect – manlikheid – moenie wys jy weet van siekte [*men don't want to answer questions – scared – masculinity – musn't show you know about the illness*]
- what then –after research?
- people scared we are using them (to get money?)

Relationships between team members

Though the researchers were very concerned with their relationship to the respondents, regrettably, the same cannot be said for the relationship between the coordinating team and the community researchers. The split in responsibilities between the research coordinator and the administrative function, meant that the people involved with data (myself and the database designer) were not formally accountable to the researchers in relation to payments. This is a key moral issue. Not paying people for work done is a fundamental breach of human rights. Contracts pose as clear-cut documents, yet there are always grey areas. Questions arose such as: Do you pay for an interview that was conducted, but is incomplete?

LEARNINGS FROM RESEARCH PROCESS

Here again the impressions gained by the interviewers confirms the findings in the research: lack of information, stigmatisation, generation gap, transport, no policies, the links between alcohol abuse, gender-based violence and HIV/AIDS.

- Darkness of information (lack of accessible information)
- Mense wil meer weet [*people want to know more*]
- People need to belong / fear of rejection
- MIV = drank: mense moet geleer word hoe om te drink [*HIV=booze: people must be taught how to drink*]
- Risiko – dronk vroue (gbv/drank/MIV) [*Risk – drunk women (gbv/drink/HIV)*]
- Plaas 'drank' in konteks [*Contextualise drink*]

- Gesinsgeweld [*Domestic violence*]
- Ouer geslag het wanopvatting – weet nie wat dit is [*Older people have wrong ideas – don't know what it is*]
- Grootmense praat nie maklik nie – wanindruk [*Older people don't speak so easily – wrong impression*]
- Stigmatisering van jeug [*Stigmatisation of youth*]
- Religion – believe that people who are not scared are vulnerable
- Transport problem
- No policies – know about
- Lekker om uit te gaan – praat met mense [*Nice to go out – go and speak to people*].

Some had problems with the quotas. Because of the composition of our teams we did not have the luxury of matching respondents by language as well as sex (and age!) – which was our ideal. Our intentions were vindicated:

- Cross sex interviews are difficult
- Not so many black people on farms.

One of the criteria to apply for the position of interviewer was access to farms, and though the interviewers had all indicated they had access to farms, some had no mode of transport. On the last day of the training course costs had been worked out, but like other decisions made that day, people soon forgot what they had agreed. Financial administration was a CRLS function, so the research coordinator was blessedly removed from the subsequent frustrations with payments.

- Distances assess, transport, roads
- Clarify access / transport costs
- Begroting / geld [*Budget – money*]

Since some interviewers were also employed in their home-base organisations, conflicts sometimes arose with workloads and deadlines.

- Setting up interviews – time
- Time of questionnaires
- Deadlines – workload at work
- Divided loyalties.

Way forward

Much of what was discussed in the way forward, was also reflected in the individual evaluations completed by the interviewers. The main concern was how to integrate the knowledge and experience gained back into their own organisations.

- how to bring information back to organisation
- how to develop organisation itself
- CRLS – organisation agreement

- Beplanning in organisasie [*Planning in organisation*]
- Identifiseer wat is nodig in organisasie [*Identify what is necessary in organisation*]
- Voordeel vir organisasie i.v.m inligting inwin [*Advantage to organisation in connection with gaining information*]
- Kan besigheidsplanne opstel met bevindings [*Can start business plans with findings*]
- Duidelike ooreenkoms [*Clear agreements*]
- organisational capacity building – CRLS and SSD.

There were suggestions to do some outreach to other organisations

- Werk met organisasies wat met plaaswerkers werk [*Work with organisations working with farm workers*]
- Fair exchange
- Strategiese verhoudings met boereverenigings [*Strategic relationships with building societies*].

Issues that were raised about working together reflect some of the learnings from this research project.

- who has financial gain?
- job roles / responsibilities spelt out clearly
- administrative costs to be clear
- Feedback to the organisation through reporting procedures
- CRLS – sort out problems with management of organisation – gave valued information to organisations.

Ideas about the wider dissemination of the information and ongoing training were given.

- Verteenwoordig bevindings [*Represent the findings*]
- volunteers to be taught community research
- Teamwork
- Meer inligting – bewusmaking, prente, plakkate [*More information – awareness, picture, posters*]
- 240 plaasbewoners opleiding gee oor MIV [*give 240 farm dwellers training on HIV*]
- Coordinate train the trainer course
- Resources.

Since the research was one prong of a multi-faceted strategy these suggestions were taken to the stakeholder forums for subsequent planning.

Summary

In feminist action research, the ethics of our intersubjectivity, a holistic and contextual analysis and respect for diversity must be upheld in every facet of the research, and

understood as part of every single relationship. Reflexivity allows us to review our actions, and decide how we can do better next time.

In the next chapter I represent the network of accountability which underlies the relationships between participants.

chapter five

Network of accountability

Chapter five forms the core of the case study, as it sketches the ethics of research as reflected in Van Zyl's model 'networks of accountability' – relationships between funders, client, consultant, employees, sub-contractors, partner institutions, associates, community researchers, respondents. It also details the training course which was held for the community researchers, as part of the ethics of epistemology.

Capacity building

Epistemologically, the training course for community researchers is one of the core parts of the epistemology of the research. In organisational development, a core exercise is establishing the common base from which a team must operate, usually a vision and mission. Since the team was not intended to be an organisation where everyone is equal, and the mission / agenda was set independently, it was extremely important to develop a sense of solidarity amongst the team members. It was also important to make sure everyone went in with a common base of knowledge about HIV/AIDS. Further, it was part of our accountability to the respondents that the interviewers were able to answer their questions and provide counselling if necessary. The whole research process therefore became an exercise of building capacity in organisations in rural areas. The training course was the first step in this process.

Training course

Training community researchers has multiple aims. As part of an environment of struggle to overcome inequalities, it works to enskill people who were disadvantaged in educational opportunities to gain skills. It is also self-serving as a pedagogical/ideological tool to ensure that the overall vision for the research is shared at least partially by everyone. Besides, the duration of the training has the effect of creating a 'team' where through participatory methods people work with other, share experiences and skills and

hopefully return with a sense of responsibility and loyalty to the coordinators and other team members. Therefore, opportunities for building emotional bonds are explored. However, as much as the potential exists, it is also possible, and indeed probable that the dynamics of oppression abuse and exploitation will be with us.

One of the key facets of the training course is for the facilitator/s to set the tone of the project. In the very first session after we'd introduced ourselves, there was an exercise to set 'house rules'. Collectively we developed the rules, and collectively we policed them through 'peer pressure'. This did not always work, and we had to find alternatives.

Training course outline

1. Who am I?

Introduction
Identities

2. Sex, love and passion

Concepts
Sexuality
Sexual behaviour

Gender values

Gender based violence
Impact of HIV/AIDS on families

3. Facing HIV/AIDS

Acronym quiz
HIV/AIDS in SA
Secrecy and shame
Stigma

4. How HIV works

How the HI virus works

5. Transmission and Protection

Protection

- Doing 'it'

Culture and HIV

6. Knowing our HIV status

Taking control
HIV testing
HIV tests

Privacy and confidentiality

7. Treatment

Living in health

8. Rights and HIV

9. Counselling

10. Research context

Context of research
Network of accountability

11. 'Good' research

Research concepts
Research ethics
Sample selection

12. Research methods

Questionnaires
Interviews

13. Analysis

Finalising interviews

14. Focus groups

Evaluation: facilitation skills
Implementation of research

Conclusion

Handing out materials

Awarding certificates.

Training venue

Part of research ethics must concern money and finances. How does one believe in 'the personal is political' and justify giving away more than half your budget on luxury accommodation? We stayed in a black community Dysselsdorp in a venue run by the community.

Sadly, we realised that our own idealism is not necessarily reflected by others. Relying on principle of social justice. Diversity of culture led to oppressive behaviour, where mutual respect was not maintained.

Venue

Network of accountability

Group work: network of accountability for case studies.

Evaluations

Evaluation is one of the criteria for reflection mentioned by Lincoln and Guba (2003:277) in establishing *validity* and *authenticity* in qualitative research by judging 'processes and outcomes'.

Training course

The first scheduled evaluation was after the training course. Most people felt very positive, and many commented on the quality of facilitation – planning, punctuality, accessibility, variety and participation. Some complained of it being too long, and that there was too much Afrikaans spoken (the dominant *lingua franca* of people on the course). The importance of these evaluations to the trainer/researcher are not so much in the literal meanings (flattering as they are), but in the tone and values which are reflected. They boded well for the research.

- Facilitator was very good and she was punctual in her work.
- Ek kon myself leer as 'n persoon waar ek verkeerd was dit reg doen.
- Groep het taak vergemaklik deur voortdurend deel te neem.
- Haar taalgebruik was duidelik, verstaanbaar. Dit is ook 'n duidelikheid dat sy wil / hou daarvan dat jy moet verstaan.
- Miskien die tydsduur was effens te lank (5:30 nm).
- Die samewerking in die groepverband was goed.
- Fasiliteerder was goed voorberei. Het kursusgangers bereik.
- Goeie beplanning van voorlegging.
- Baie goeie benadering van probleem oplossings.
- Aanbieding interessant. Afwisseling om verveeldheid uit te skakel.
- Die groep deelnemers was tops.
- Dit het baie vir my as indiwidu beteken:
    - die leerling
    - die reghelp
    - die doen.
- Was very important to learn more.
- Too much Afrikaans

- Fruitful / very much.
- There were something new.
- The course was very nice and I enjoyed it very much. I've learned many things I did not know before.
- Baie beter houding jeens HIV/AIDS
- Goed: die training manual is goed saamgestel.

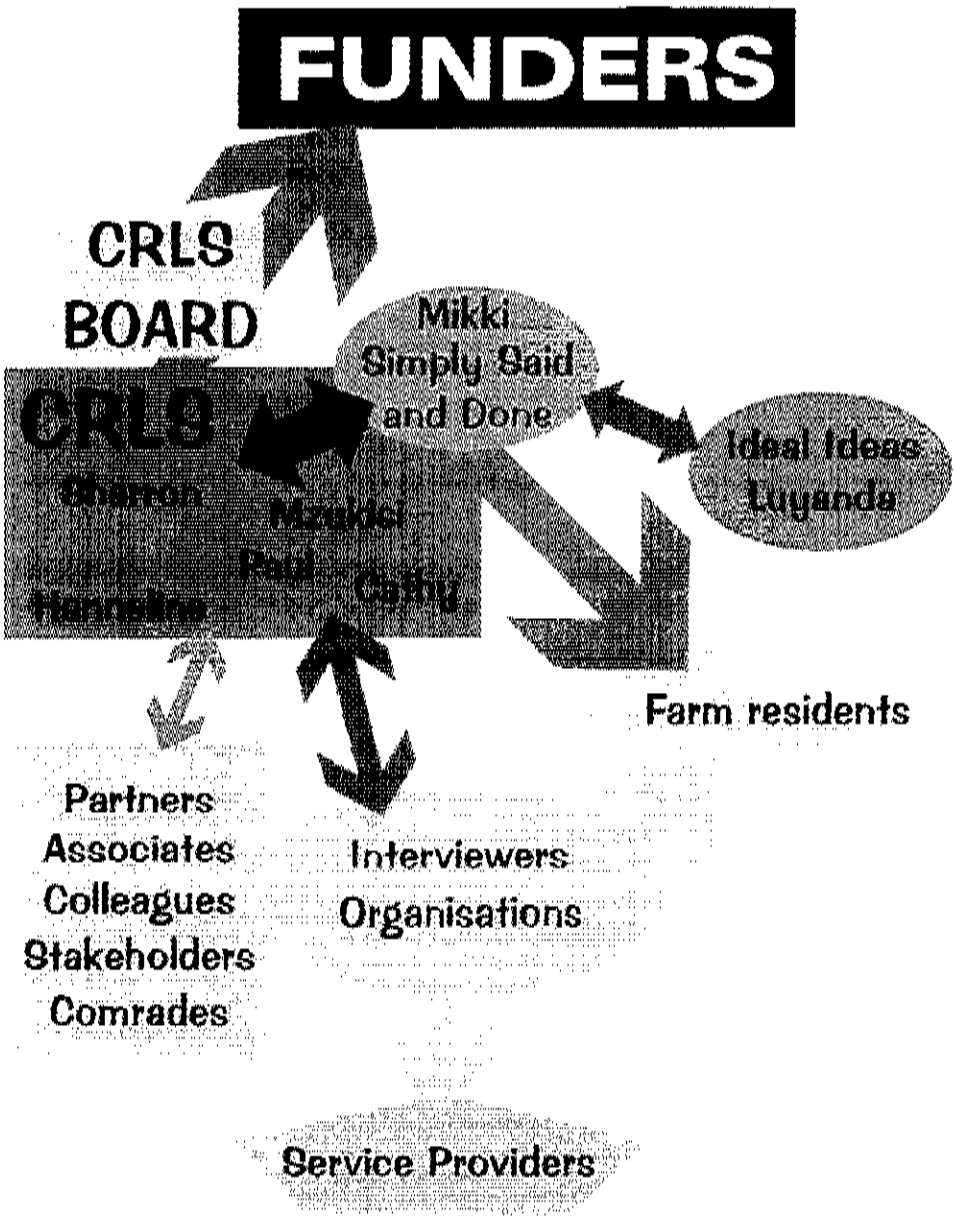
Interpretation

As the analysis proceeded a framework for interpretation emerged. The team had regular meetings to share information and findings. After the information from the questionnaires had been encoded and analysed, the preliminary findings were presented to four stakeholder forums. Workshops were subsequently conducted with them to complement the information gathered in the other focus groups.

Through several of these processes of analysis, presentation, discussion, re-evaluation and re-interpretation, the themes became more tangible and conclusions could be drawn in relation to the recommendations.

The key to the success of this enterprise undoubtedly lay in the excellent teamwork and close empathy between the researcher and database designer. It would have been an almost impossible task to analyse, cross-reference and check our findings for such a large amount of qualitative information in three languages in such a short time!

Network of accountability



Training

A five-day training course was conducted (in Afrikaans and English with Xhosa translation) for interviewers so that a common vision and skills base could be developed. Training also helps to ensure that the information that is being collected is done consistently. The mostly Afrikaans and Xhosa speaking trainees received a training manual (in English) as a source of information about the issues and the research process. Regrettably we did not have time to translate them.

During the training the following criteria for interviewing were established by the research team (MIV/VIGS op plase opleiding: Narrative Report 2005).

> Once you have set up the interview and you are talking to your respondent in a safe place where you won't be disturbed you:
>
> - Tell the respondent about the project.
> - Tell them they may stop the interview at any time.
> - Tell them they may ask questions during the interview if there is something they would like to know.
> - You answer any questions they may have at this point.
> - You get their consent to being interviewed.
> - You interview the person.
> - You thank them for their cooperation, and tell them what the next step is.

During the training we encouraged interviewers to establish a respectful, but not necessarily formal relationship with their respondents.

If they could not complete the whole questionnaire, they needed to record the reason in their field notes. They were asked to complete and 'tidy up' their questionnaires before handing them in.

chapter six

On the way

Finally, in chapter seven I conclude with how the process of research itself becomes part of the 'action' of advocacy, and the imperative to continue the process.

In chapter two I spelt out the aims of action research as being concerned with developing knowledge for political ends – activism, advocacy or empowerment for participation in political processes. Did the HIV/AIDS on farms research process contribute to these political ends? and how were they achieved? what are the limitations?

1. advocacy – building of stakeholder forums
2. activism – participation in launch
3. empowerment – capacity building of organisations; individual community researchers; group of women on Molteno farms.

Dissemination / advocacy / ongoing projects

Stakeholder forums

The processes of advocacy have been put in place through the launch of two stakeholder forums in each of the districts. They operate quite differently: one is working at a political level with the Integrated Development Plans, while the other is mobilising in small local clusters.

Mural painting

For the launch of the stakeholder forums in May 2006, a group of farm dwellers were trained and the children participated in a mural. It was a day of festivities and mobilisation.

Producing picture books

The research report would not have been read by the respondents. In order to reflect the findings of the research back to the respondents, we created a picture book and set the

findings in a story (Van Zyl 2006b). A draft copy was produced and piloted with some of the community researchers. These books were distributed by the community researchers on the farms where we had conducted the research.

This transparency and writing in a clear style, may enable both researched and readers to understand not only how the researcher arrived at 'the findings' and therefore make their own judgement about them, but also, simply, to understand them (Lentin 1994).

Producing services referral booklet and lists.

Process not closed. Other people would have done it differently, but would they have the same conclusions? No.

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