

The selection and training of fieldworkers in educational research: a Western Cape inquiry

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In this qualitative study we investigated how fieldworkers in educational research were selected and trained, using questionnaires and individual interviews to gather data from both researchers and fieldworkers themselves. From an original sample of 17 researchers, a purposive sample of 12 researchers and 16 fieldworkers was identified. The principal researchers collected all the data, which were analysed according to themes and patterns using the constant comparative method. The findings suggested that, for a number of reasons, researchers struggle to achieve the quality of fieldworker training that they know to be desirable, and that certain forms of research run the risk of underestimating the importance of training fieldworkers. The study also illustrated how different understandings of the term 'fieldworker', both in the literature and in practice, affect researcher expectations of fieldworkers. We conclude by alerting researchers to the risk to the quality of data if fieldworker roles are not carefully defined.

Introduction and context

New policy and developments in the field of curriculum call for massive changes in South African education. In implementing change research is crucial to inform decisions and evaluate practices. Research in the social sciences, education included, increasingly makes use of qualitative approaches in addition to the more traditional forms of quantitative research. Both approaches make valuable contributions to knowledge but the former is less well established in South Africa and, consequently, less consistent in quality. Taylor and Vinjevold (1999), commenting on research conducted for the President's Education Initiative, noted this unevenness. One possible source of variation is the degree of rigour with which data are collected. Miles and Huberman (1994:10) maintain that the strengths of qualitative work depend on the quality of the data analysis which, in turn, depends on "... well collected qualitative data ..." It seems important, therefore, to inquire into the selection and training of the research workers, frequently referred to as fieldworkers, who interact directly with the target population or group.

Conceptualizations of fieldwork

A review of the international and national literature revealed that significant variations exist in the definition of fieldwork, and that detailed information about the selection, recruitment and training of fieldworkers was surprisingly infrequent.

Fieldworker roles, skills and training: Theoretical orientations

In the context of development work a fieldworker may be defined as a person whose primary task is to educate. He or she may or may not have formal qualifications but is perceived to have access to a particular community. Maart and Soal (1996:1) argued that developmental fieldwork "... is primarily about mediating or facilitating learning of individuals and groups and about creating an environment in which people can risk, grow and develop ..." They concluded that it is essential for developmental fieldworkers to have a good understanding of adult development and learning and to be trained in the skills necessary for relating to people, analysing situations and designing strategies. The role may, but does not necessarily, involve some form of collaborative action research. The participative action research model tends to blur the distinction between fieldwork as research and fieldwork as development.

In the context of market research, a fieldworker is defined as an objective collector of data. Even if the data are to an extent qualitative

and involve a certain amount of judgement, the assumption is that data analysis and interpretation will be carried out independently by others. Tamblyn and Shelton (1996), for example, describe in a comprehensive market research manual the data collection skills that fieldworkers should possess, and recommend that interviewers (fieldworkers) be selected with great care and trained for a stipulated minimum of four hours before undertaking quantitative data collection. In qualitative research the calibre of interviewers is, they maintain, as important as the discussion guide. With regard to qualitative work, they add that a very highly trained and skilled field force is required since initiative and judgement will be required "... in deciding which issues to follow up and probe and which to let go ..." (1996:74). The debriefing of a qualitative field force by those who are to process and analyse the data is considered crucial. Initiative, judgement and intuition are mentioned as desirable qualities in those who carry out the analysis but no specific criteria for the selection of fieldworkers are suggested.

The academic research context includes the understandings of fieldwork typical of market research but also introduces a third, and more complex, conceptualization. From this perspective "... Fieldwork cannot be done without gathering data, but it entails far more than data gathering as a process of sustained inquiry ..." (Wolcott, 1995:249). The fieldworker, he maintains, is the primary researcher, well informed yet open to the unexpected, sensitive and observant, self-aware yet capable of gathering 'outsider' impressions. In addition, the researcher-fieldworker possesses highly developed interpersonal, interview and writing skills and a disposition to be intellectually curious since, as Wolcott (1995:238) reminds us, "... the essence of fieldwork is the mindwork that guides it ..."

Ethnographic fieldwork involves a range of activities that may include negotiating entry into a community, living in or near a culture over time as a participant observer, interviewing key informants, observing key events, studying artefacts and documents, and making extensive fieldnotes. The fieldworker/investigator integrates all the data into a meaningful whole that conveys information about the culture or subculture being studied. This typically takes the form of a written document that, it is hoped, can be of value both to those outside and those within the culture, which suggests that indirect development work is to an extent implied within this approach.

In addition, interviewing skills are an integral part of the ethnographic fieldworker's repertoire. Qualitative research texts highlight the importance of interviewing effectively. Marshall and Rossman (1995:81) write, for example, that "Interviewers should have superb

listening skills and be skillful at personal interaction, question framing and gentle probing for elaboration." It is also known that different patterns of interviewer questioning, language and communication can influence informants' responses (Briggs, 1984; Dubois & Horvath, 1992; Mitchell, 1993).

The fieldworker as ethnographer is described as developing through graduate studies and the guidance of mentors. Wolcott (1995) cites a report by Plattner (1989) that describes the skills of a professional ethnographer. These include: techniques of observation; design, techniques and strategies of interviewing; data recording, coding and retrieval skills; finding and using published and archival sources; thematic analysis, quantitative research design; various statistical procedures; and the use of microcomputers for word processing and data analysis. This is familiar as a description of a postgraduate course in research methodology. Graduate students hired for a specific project are likely to receive, in addition, focused training about a particular project, as described by Perkinson (1991).

Gilbert (1993:158) cites Lofland (1971) as stating that the role of the fieldworker is "... somewhere between that of the 'Martian' and the 'convert' ..." and points out that this marginality is crucial for success. Being simultaneously an insider and an outsider creates the space for creative insights. According to Wax (1971:3) the ideal is to "perceive and, hopefully, describe, those relationships, systems, and patterns of which an inextricably involved (and perhaps thoroughly socialized) insider is not likely to be consciously aware."

A close study of accounts of academic fieldwork sometimes reveals, however, an almost invisible participant, namely the contact person, interpreter or translator. Wevner and Schoepfle (1987:247), who themselves made use of a Navaho 'consultant', write that "Very often it is the young, relatively educated or literate people who become the ethnographer's co-researchers ..." Hendricks and Meade (1993:12) had a "Samoan-speaking research assistant." Wax (1971:9) speaks of sending out "... our young Indian interviewers..." In this role the fieldworker works very closely with the ethnographic researcher. Weil (1995) warns, however that working with a local assistant or translator has its perils and recommends multiple methods of data collection if language is an issue. It appears to be difficult to combine 'outsider' research skills and attitudes and 'insider' local knowledge in one person.

The above description emphasizes fieldwork as ethnography but it is obvious that there is considerable overlap with other forms of qualitative research. Any qualitative researcher must possess several of the skills of the ethnographer, including the creative and integrative abilities to construct a coherent, balanced and meaningful story out of the data. When fieldworkers are employed to gather qualitative data, however, the issue becomes the articulation of the story told by the researcher with the stories reported by the fieldworkers.

Fieldworker roles and training in reports of educational research

According to some recent international journals, qualitative research in education is frequently carried out by academic researchers themselves. It appeared that academics were frequently the principal investigators, supported by a "... cadre of graduate students ..." (Marshall & Rossman, 1995:132), whose training was not made explicit. In some cases, for example, Bean, Cantu'valerio, Senior and White (1999), teachers were mentioned as collaborators but no reference was made to any special training in research.

In South African journals some authors, for example, Bisschoff and Phakoa (1999), Du Toit and Kok (1999), Van der Merwe and Alant (2000), Vorster and Sutcliffe (2000) and Wilken (2000), leave readers to infer that they themselves collected the data since no mention is made of any secondary researchers. In most cases the numbers involved are small and this seems a reasonable inference. Others provide more detail. Mabeba and Prinsloo (2000:35) mention that "... the researcher personally collected data from all the pupils and clarified all problems pupils experienced in answering the questions ..." The researcher is later identified as a "... well trained educational research methodology student ..." In another study, group questionnaires were

administered by the schools' teacher-psychologists "... wie volledig oor die prosedure ingelig is..." (Olivier & de Lange, 2000:54). Booyse and Swanepoel (1999:217) refer to "... 'n intensiewe opleidingsessie vir onderhoudvoerders ..." In none of these cases is the nature of the training explained. Hall and Engelbrecht (1999:130) refer to the use of "... the basic principles of interviewing outlined by Bogdan and Bilken (1992:174)" but do not provide any information about how the skills derived from these principles were acquired by those who collected the data.

It appears that the term fieldworker is commonly used, albeit with different meanings, in contexts other than research and in both quantitative and qualitative research contexts. Qualitative researchers working in the field of education operate both as hands on ethnographic fieldworkers and with the aid of fieldworkers who gather data according to instructions. For the purposes of this research a fieldworker was understood to be a person who gathered data on behalf of a researcher or research team.

Aim of the research

The research addressed a qualitative question: How do educational researchers working in the Western Cape select and train fieldworkers who are to be employed in qualitative research projects? Its objectives were to identify the criteria and procedures used to select fieldworkers and the range of training practices adopted.

Research design and method

Design

This was a descriptive, qualitative study that aimed to portray the range of current selection and training practices within a particular research community. The design was to an extent emergent. Responses to the initial questionnaire informed the interview schedule and themes that emerged in some of the earlier interviews were noted and explored in subsequent interviews.

Research participants

Researchers

Initially, a convenience sample of 17 researchers was requested to complete a questionnaire designed to clarify the variation to be expected. Selected members of this original group (chosen for their different contexts and orientations) plus additional researchers (included to ensure that a wide range of perspectives was represented) made up the group of 12 researchers who were individually interviewed. Technically this was a purposive sample aimed at illustrating a range of practices, with availability playing a role in the final selection of participants.

The researchers were either academics at the three universities in the Western Cape or independent researchers who worked for organizations or for themselves. In all cases the researchers were known to be conducting, or have conducted, qualitative research in the field of education.

Fieldworkers

On the initial questionnaire researchers were asked to provide a list of fieldworkers whom they had employed or were currently employing. The 16 fieldworkers who were interviewed were selected from this list. Most were, or had been, students in tertiary education and had some form of academic qualification. Approximately 50% were speakers of at least one African language. Again this was a purposive sample and the data in terms of the focus of the inquiry appeared to be saturated after 16 interviews.

Data collection

Researcher questionnaires

An initial semi-structured questionnaire was designed in order to elicit general information about researchers and their practices. This questionnaire and the responses it evoked provided the basis for the in-depth interviews.

Researcher interviews

Respondents were individually interviewed, (using an open-ended interview guide), to develop and clarify what they had written in response to the questionnaire, or to provide yet another perspective. All interviews were conducted by one or other of the primary researchers, tape-recorded and transcribed.

Fieldworker interviews

Fieldworkers were individually interviewed using guidelines developed for the purpose. All interviews were conducted by one or other of the primary researchers, tape-recorded and transcribed.

Data analysis

The process of analysis followed the guidelines recommended by Glaser and Strauss (1967) and Maykut and Morehouse (1994). Within a framework determined by the two areas of particular interest, namely selection and training, the data were analysed according to themes and sub-themes identified independently by each researcher, and subsequently refined by the researchers as a team.

Validity of the data

In order to promote the internal validity of the findings the data were triangulated by accessing the perspectives of both researchers and fieldworkers and by using different forms of data collection, namely interviews and questionnaires. For the same reason the data were collected by the authors of the research, both of whom are skilled and experienced interviewers. It is possible that the inevitable power differential between university academics and fieldworkers occasionally limited the data, but this did not appear to be a problem. No statistical generalizability is claimed for these research results but, to the extent that the situations referred to are familiar to researchers, analogies may be drawn and used as a basis for further investigation.

Ethical considerations

Interviews were conducted with respect for the persons and privacy of the participants and care was taken to ensure that no individual researcher or fieldworker is identifiable in the reporting of the results. The research was ethical in intent in that the findings were designed to be of benefit to the research community as a contribution to the quality of research in education and, thus, indirectly to the entire South African community.

Research results

The results are presented in three sections. The first two sections represent the two focus areas of the research, namely, selection and training. In each section themes and categories within themes are identified. The third section reports on influences affecting both selection and training, using a similar framework of themes and categories.

Fieldworker selection

The two major themes related to selection were criteria and recruitment practices.

*Theme 1: Criteria for selection**Academic knowledge*

This sub-category includes insight into the particular topic being researched, broad understanding of the research process and basic writing skills. It was considered important by all researchers. For example, researchers stated that "an exposure to a body of theory in a particular area makes a huge difference" and that "a deeper understanding of the purposes of the research" was desirable. Certain researchers highlighted technical skills such as "being able to write, actually being able to document what has happened during the day". This was frequently, but not necessarily, linked to qualifications, for example, "I don't think you need high educational qualifications but I do think you need to be able to read and write well." Even for simple

data collection "clerical skills and recording skills are essential." Without such skills, "they do amazing stuff in the field, they come back and they can tell you about it but they haven't got it written down and that's ultimately what every project now requires."

It was assumed, albeit with acknowledged reservations, that academic qualifications were the best available evidence regarding academic knowledge and skills. Researchers made statements such as "ideally I would have liked to select BEd or Masters students." One reason given was that such people "will be able to read up quite quickly" about any particular field involved. One researcher pointed out that for certain types of work only a person with a PhD and experience in research would "know what to listen for". However, the academic levels considered appropriate ranged from a matriculation certificate to a doctorate, depending on the complexity of the research and the responsibilities to be entrusted to the fieldworker. A substantial understanding of theory was felt to be crucial if the research was open-ended and necessitated judgement and probing.

Fieldworkers agreed that academic qualifications mattered, citing "the fact that I have done my degree", or "both of us have PhDs" or that they had "done very well in HDE" as reasons for their selection, and seemed to assume that a degree implied competence. Most of those interviewed were in fact graduates. Interestingly, one fieldworker commented that "I worked in the field for a long time and no-one had asked me to do that kind of work before but the moment I became a student (at M level) I became acceptable."

Research related experience and skills

Several researchers felt that it was desirable for a fieldworker to be "a person who had done research already" presumably in terms of the attitudes and skills this experience was assumed to have conferred. Some researchers specified particular abilities such as "observation skills", the ability to "cope with the organisation demands of data collection", the ability to "conduct the interview and capture the data", and conduct empathic and insightful interviews. "Report writing skills", including the ability to make appropriate fieldnotes and familiarity with computer technology, were also mentioned. One researcher pointed out that "only people who've got experience in research know what to listen for".

Although fieldworkers were aware that "exposure to research" and experience in collecting data was an advantage, they were not as specific as researchers about the various skills required.

Understanding of the target context

Researchers agreed that fieldworkers needed to share and understand the social and cultural practices of the communities that were the focus of the research. One researcher captured this view by saying "you can't have meaningful interviews with people unless you know a helluva lot about them and the context they come from". Others referred to "experiential knowledge", "easy access" and even "access to the people you don't normally get access to" as important. It was a question of being "comfortable and familiar" with a particular setting and even, at times, "able and willing to do that sort of thing" (work in townships or squatter conditions). One researcher pointed out, however, that belonging in a particular community might also have disadvantages, saying, "I subsequently realised that it wasn't such a good thing ... sometimes the closeness ..."

Some researchers also noted that age ("in the African community age is quite an important factor") and gender ("We specifically wanted men so there was a little of a bodyguard eventually to it") might be criteria depending on the nature of the project. The researchers all worked in the field of education so, not surprisingly, many preferred fieldworkers with experience in education that related specifically to focus of the research.

Fieldworkers were very clear about the importance of contextual fit, described by one fieldworker as "the understanding of how things usually work in certain communities." Remarks such as "we were chosen because I grew up in the townships so I knew what's going on"

and "I was like doing counselling in black townships and I was at the coloured school so I had very good experience of both worlds" illustrate this.

Linguistic competence

Fluency in the language of the target group was an obvious and important criterion for researchers. "The interviewer must have that ability to speak the language of the respondent". Other researchers expressed this more concretely, for example, "I needed Xhosa-speaking students as fieldworkers." At times this criterion overruled others. One researcher explained that "we wanted a Xhosa speaker so we took her on but she didn't have any research experience and she had no qualification". Fieldworkers also needed to be relatively fluent in the language used by the researcher, which in all cases was English, even when it was not the researcher's first language. According to one researcher, "language proficiency in English ... it was terribly important." The fieldworker had to be able "to express, to be able to clarify, and understand what the other person is saying ..." and to capture this in writing. The one researcher who had worked with an interpreter raised a concern that echoes the literature — "the translator's supposed not to get involved but never yet have I felt confident that that has actually happened because I've asked a short question and I heard a lot of talk."

Fieldworkers were well aware of the importance of language. Several mentioned that their linguistic competence was a reason for their selection. As one said, it was important to have "someone that can speak the language."

Personal characteristics

Researchers emphasized "an ability to listen" or "a kind of gift for drawing people out" and one mentioned that "counselling experience is excellent." They also stressed professionalism, which included the assurance to persuade respondents to participate, and the ability to work well with colleagues. A fieldworker needed to be "confident, able to relate well to people, friendly" and "not look like they feel unsure of themselves, not mumble." Researchers also looked for interest, commitment and initiative because "you can never be out there in the field with them all the time — they have to respond to situations that can change — a kind of initiative but I wouldn't expect an awful lot", otherwise described as "a response and a preparedness", or "a spark that is needed here, of commitment, of professional pride, of just doing it with enthusiasm" and being "genuinely interested in what these people have to say." This might require at times "quite a lot of gall" and "determination and perseverance." Only one researcher specifically mentioned care and rigour in this context but it is possible that this was implied in professionalism and commitment.

The researcher's orientation determined certain personal criteria. For example, a researcher who saw developing young researchers as an important element "selected people who would be prepared to see themselves as co-workers ... to take on that responsibility" and another who adopted a highly interpretive approach reflected that "I think it has to be somebody who can think their way into what you're looking for ... that's what you need, a keen detective."

Fieldworkers had less to say about personal qualities. One fieldworker mentioned diligence ("She knew I was quite hardworking") as likely to enhance her employability, and several referred in different ways to the importance of commitment. They spoke of being "extremely enthusiastic", having "a sense of interest and fascination", and being committed to the objectives of the project. One fieldworker stated that fieldworkers needed to "have some vested interest or passion about what they are doing because what I have seen where that's not the case is people just don't really care about what they're doing, they're not methodical, they're not making sure that everything is filled in, or that it's a logical response, or whatever." Commitment was also perceived to be necessary because "it is not always comfortable, waking up early in the morning so that you can get there in time" and

"carrying in the hot weather very heavy packages" and, according to one fieldworker, "because fieldwork is being looked down on".

Practical criteria

For the researchers these included availability, convenience in terms of distance, and personal mobility. The fieldworker had to be able to do the work at the time required, sometimes at short notice, and able to attend research meetings regularly. As one researcher said, "It is important to have direct contact, preferably on a weekly basis". Another mentioned that the team selected "people who were mobile". The final quotations in this paragraph capture a not uncommon situation. "If it had been done when it was planned X would have done it ... we had to get other people. I was desperate to find someone" and "I decided to employ her because she was available." Fieldworkers, if they mentioned such practical criteria, confirmed the above.

One researcher expressed what seemed to be a general view, saying, "What you're looking at in the end is somebody who's got all these things", but the data suggested that such a person was often difficult to find. Researchers acknowledged that a trade-off might be necessary, a position well captured in the following quotation: "We were prepared to compromise on a number of key variables, depending on what people brought." One researcher provided some justification for this by saying, "I can list the criteria I am looking for, but in the end I make a judgement call — it's an art, you can't specify the criteria exactly."

Theme 2: Recruitment practices

Personal contact and networking

By far the most common practices were personal contact and networking. One researcher chose "people known to me from previous projects or as colleagues and also a former student who had worked for someone else". Another asked a colleague, "Give me your keenest and nicest fourth year students". Yet another pointed out that "it often happens that if somebody does some work for you, they've got friends who would like to work for you, or people approach you". In its extreme form networking can look like this: "Z was in fact supposed to do it and then she dropped out because she had too much work and she brought X along and then X recommended this other person". There definitely exists "a network of people who've been involved somewhere or other, that we've worked with, or met, or whose work we've been associated with, or found out about somewhere along the line". The implication is that "we rely heavily on good references from colleagues."

Fieldworkers confirmed this approach to recruitment saying, for example "she saw I had potential", or that the researcher had "worked with me, supervised me."

Development of a fieldworker 'pool'

Some researchers preferred to employ known and trusted fieldworkers, "people we know of and we feel share similar values". The following quotations show how this becomes possible. "It's always a good thing to have a little supply of people that you can call on, people that you've trained"; "anybody who is embarking on a lot of research is bound to have files of names"; "we've got a sort of list and we try to grow that."

Advertisement

Sometimes researchers used more formal routes. "You need to have your job description I suppose, like in any other job, so that when you're advertising or you're looking for interviewers you'd need to stipulate what you required. If they applied for the position it would be like any other position — they either meet the criteria or they don't." Some researchers advertised positions and one mentioned interviewer agencies as a possible source of fieldworkers. None of the fieldworkers interviewed mentioned having responded to an advertisement.

Prescribed involvement of students

In certain contexts, recruitment was simple: "That's actually the policy in our department, to get our students to work and do research in our existing focus areas — about 90% of my research work, students are involved."

Fieldworker training

The themes that appeared most helpful in presenting the more complex data regarding training were: models of training and fieldworker experiences.

*Theme 1: Models of training**Engagement model*

This model involved a "labour intensive hands-on partnership sort of training" between researchers and fieldworkers, who were engaged in the investigation of their own contexts. Significant within such a model were the multiple levels at which the research cycle was operating. The following example illustrates the point: "The project started out initially as helping teachers to begin to think of themselves as researchers in their own classrooms by reflecting on the work they are doing. At the same time the consultants were reflecting on the work they were doing in the process of helping the teachers to reflect on theirs, if that makes sense: cycles within cycles. But at the same time reflecting on what we were doing out in the field in order to improve our own practice to achieve an end in the field."

Implicit in this model is an understanding that fieldworkers bring something to the process and that they do not necessarily need to be "trained" in a technical sense, but brought into the research process. The following account of three preparatory workshops for fieldworkers illustrates this. "We involved them in the process of thinking through what it was we needed to know, what kind of questions we needed to ask, who were the people we were asking questions of, all sorts of things like that. So, we didn't think of it as a training process but it certainly was ensuring that the team shared an understanding of what was expected, how to go about it and what we hoped the research might yield."

Mentorship model

Mentorship involved a process whereby "inexperienced researchers worked alongside more experienced researchers." Researchers with "good academic background at a high level of responsibility" worked together with "research assistants with less academic background and with less responsibility and more supervised work." Researchers would "go into the field" with fieldworkers where they would "engage with people, co-work where they did fieldwork together and produced joint stuff with some shared responsibility." In some cases "the research assistant had extensive skills which weren't academic ... they had multiple skills and access to different types of communities." A striking feature of this model is the recognition by the researcher of reciprocal nature of the learning within this context of training. Fieldworkers "had to re-educate" the researcher on certain occasions. One researcher admitted to being "quite dependent at times on her analysis and on her advice" Another stated that "they were learning and I learnt from them." In this model, however, there was always a distinct mentor–fieldworker relationship operating, suggesting that despite their dependence on fieldworkers or assistants, the researchers were still the owners of research expertise and the authors whose voices were finally most audible in the completed project.

Partnership model

This model, although similar to the mentorship model, suggests a more subtle relationship between researchers and fieldworkers/assistants. The latter are viewed as partners who have equal responsibility and decision making power. Researchers who used this model assumed that people would work better "if they see themselves as a partner ... They simply give better work if they understand what they're doing. And they really understand what they're doing if they are part of the

design. So, actually I do see it as the best way to go in order to produce quality."

Fieldworkers in a partnership model viewed the project "as their own", to such an extent that one fieldworker confronted the researcher when she felt that her work had been too heavily edited, and the researcher admitted her right to do so.

Common within this model was the need to ensure that the research process was explicit to fieldworkers. Researchers emphasized "talking about the steps as explicit steps, talking about decisions as explicit decisions rather than assumptions, talking about different ways of proceeding at a particular point, by using the terminology, by discussing the process and explicitly discussing how to go about it." While the nature of the training was informal, researchers remained keenly aware of the competencies they wanted fieldworkers to develop. Researchers committed to training within a partnership model were aware of its time-consuming nature but considered it time well spent.

Apprenticeship model

This model assumed a hierarchical, "master / student" relationship between researcher and fieldworker. Experts take students or fieldworkers under their wing, so to speak, and work with them, training in an "incremental" way. According to researchers who used this model, training would begin with developing an understanding of the theory to "make sure they know the theory behind it" and later progress towards practical involvement in data collection of some sort. One of the researchers who used this model intimated that it was "not the kind of training where you can sit down and just teach someone 'this is how you do it'. They need that apprenticeship where you are with them and monitor them and give them feedback all the time, so they are developing skills of interviewing."

Researchers acknowledged that it was a time-consuming model that required intensive input and regular feedback to fieldworkers. This model differs from the mentorship model in that it incorporates the notion that fieldworkers have to practice until they reach a certain level, but will not then be on a par with the researchers themselves.

*Theme 2: Fieldworker experiences of training**A formal and technical process*

Training that focused on very specific skills was usually associated with time constraints and a specific focus. In training, "instructions were quite detailed in terms of what we were supposed to do or not supposed to do." Researchers were often perceived as looking for particular skills for a particular job and not necessarily expecting anything more out of the relationship. For example, one fieldworker understood the object of training as "to conduct interviews and how to quote what is known." Fieldworkers would practice until the researcher was confident of their performance. In some a more "senior" fieldworker who had a little more experience would act as the "leader", mentor or critical voice to the rest of the fieldworkers. Researchers were "present, it was close supervision, just keep reminding us that in no way should we in the translation give answers".

An informal process

This was seen to work particularly well when fieldworkers were engaged over a substantial period of time. One fieldworker suggested that the training "was quite an informal process and very much as the need arose for things". There was a suggestion that the route followed was "the ideal situation" especially when the fieldworker had worked for some time in the same research unit. It was seen to involve the "luxury of time" as one fieldworker put it. Sufficient time implied that the fieldworkers could work on a "trial and error" basis, learning day by day. Although this form of training was suggested as the ideal way of working, one fieldworker intimated that, on occasions, having "some instruction of the whole thing" would ensure more productivity.

Much of the training occurred in discussions after fieldworkers had completed some work or "on-site" where fieldworkers worked col-

laboratively alongside more experienced researchers. Thereafter the team would have a "collective discussion around that and then isolate issues and discuss them". One fieldworker described this as involving a "very close working relationship" during which the fieldworker "would constantly check with [the researcher] and ask questions".

An implicit process

Of those who described their training as informal and on-going, some were not clear about the process. One fieldworker suggested that there were times when having "that kind of leadership" and "someone clearly in charge" would have lessened feelings of frustration. Another fieldworker suggested that "understanding the full process" should be a critical focus in the training, because the trainer could "say it 100 times, but then as you capture the data you find how important it was that you did everything that was taught in the training." This fieldworker was of the opinion that, in the training, nothing should be implicit or left to chance.

Influences on the selection and training of fieldworkers

The two major themes were labelled academic/professional influences, and non-academic influences.

Theme 1: Academic / professional influences

Researchers' own training

Researchers' training generally took one of five forms. Some researchers had received rigorous, structured and intense formal training. The second type of training developed research capacity through formal master's and doctoral work, but was perceived as limited in nature. As one person suggested, "in retrospect I actually understood very little about the process." Researchers in this category usually relied heavily on reading research methodology texts. The third, and largest, category of researchers included those who described themselves as self-taught. They expressed this as a "sink or swim", "trial and error" approach. These researchers regarded their induction as being through reading and "personal experience, by means of reading other people's research." The fourth type of training took the form of a "very strong apprenticeship" working as a research assistant. Incrementally, more responsibility was placed on the researcher as he or she moved from conducting surveys to co-ordinating other fieldworkers. The final category of researchers were those who had simply picked up what they needed to know. One researcher commented: "I don't know how I knew ... I have never done research courses which I've always felt to be a bit of a hindrance ... I've never done modules in research methodology and stuff like that. I just picked it up, I've just learnt about it ... I don't know, just doing."

Nature of the research task

Researchers were well aware that simple data collection could be carried out by less qualified and experienced fieldworkers, but that fieldwork as anthropologists understand it required very highly skilled persons. Even simple fieldwork was perceived, however, as "not such an easy job" requiring fieldworkers to be able to listen well. Similarly, researchers preferred fieldworkers who had some knowledge and experience of the area under investigation.

Discipline area and typical research practice

The nature of the research task determined not only the nature of engagement with fieldworkers/students, but also the type and duration of training provided. As one researcher pointed out it would be "almost impossible to send a lackey into the archives for things that you are looking for. Because, by definition, what you are looking for is not exactly clear, unless you're looking for statistics or something like that which is straightforward kind of stuff." Another researcher needed to spend a long time with fieldworkers before the research, "getting them to understand" what he was looking for. Researchers were influenced by the degree to which fieldworkers were "interested in the research area" and their ability to "understand the underlying

theory." This, it was suggested, made training easier and provided the motivation for fieldworkers to "buy-in" to projects.

Ethical considerations

Researchers who were committed to capacity-building actively recruited fieldworkers (usually students) who appeared to have potential as future researchers. "I see it as part of our responsibility as senior academics ... to recruit talented young people into education research." On the other hand, other researchers were concerned about "using" students "as cheap labour kind of stuff" and preferred not to employ them.

One researcher highlighted a very important dilemma: "People in the community were getting resentful that none of them were getting offered paid work by me ... Eventually I actually took on two people from the community to collect data for me but I was really hampered by their lack of skills ..." This experience was sometimes shared by researchers who consciously adopted a philosophy of competence and perceived no need for selection criteria other than recommendation. One researcher stated "I take it for granted that people can do a good job and I'm disappointed afterwards when I realize ... they didn't do it." Another pointed out that assuming competence "can be as potentially damaging or dangerous as assuming lack of competence ... a whole lot of problems can ensue from assuming competence."

Theme 2: Non-academic influences

Budgetary policies and constraints

Researchers pointed out that funders' policies with regard to the employment of fieldworkers frequently resulted in less than ideal research conditions. As one expressed it "the pay is ridiculous ... it's designed to create bad research", while another pointed out that "certainly research assistants, I think there's never enough funding." Poor remuneration and short term contracts for fieldworkers influenced selection, as for example when "We have sometimes had to turn down very competent people through just not being able to pay them." Depending on the funder, a researcher might or might not be able to employ and train capable fieldworkers and it was suggested by one researcher that "it would be useful to have a standard rate on what they get paid" since, researchers agreed, "there's an amazing range that you pay people."

Budgetary constraints also made it difficult to engage in particular forms of training, more specifically, mentorship and apprenticeship models. One researcher suggested that "if you want to fully induct a research assistant right the way through the project and let them walk away with real experience, they need to be there right from conceptualization." But "the funding was always so tight" that "you could not employ people in the project for its duration." Some researchers felt strongly about the categories under which funding is provided and the perceived inflexibility of funders, who do not permit researchers to use their discretion in hiring research assistants or fieldworkers. This situation restricts researchers from employing fieldworkers or research assistants at the conception of the project because, in most instances, the funding has not been secured. In addition, funders offer a "relatively a low salary" for research assistants or fieldworkers, thereby precluding the researcher from employing people who might either be skilled or have the potential to excel given a supportive environment and a systematic mentorship programme.

Time constraints

One researcher admitted that "in all the research I've done I've never had enough time to do it properly", explaining that "funders are not prepared to spend that amount of money." Time constraints may arise out of inappropriate funder and/or client expectations, late arrival of funding, or unavoidable additional demands on the researcher's time (especially in the case of academics). Time pressures influence selection in the sense that there is often some urgency to appoint someone, and have an important influence on the quality of training.

The "pressure of doing research [while] at the same time [being involved] with your academic job and your teaching" influenced the

nature of training. The resultant effect is that "you are not devoting as much time as you want on research". Another researcher commented: "You've only got small bits of time here and there", suggesting that this precludes systematic collaboration.

Fluidity of the fieldworker population

Fieldworkers were sometimes difficult to find, and/or resigned for a variety of reasons. Initially, for example, "you have a problem in actually finding the students" because most of them are part time and already working in education. Others "didn't want to give up their time because they wanted to complete their degrees in one year." Fieldworkers understandably moved on if they could, for example, "He actually left us and he went to a bank where he got quite a senior position" or "He then left for a very high profile job ..." In another instance, "she's got a reasonably good job I think ... I was a bit cross with her because she left me in the lurch."

Given funding policies and time constraints researchers might not have the luxury of choice when it came to a replacement.

Discussion and recommendations

This small qualitative study illustrates a dilemma faced by many researchers. The data strongly indicated that most educational researchers were aware of the importance of careful fieldworker selection and thorough training. A parallel theme, however, was the difficulty of achieving this ideal, given the constraints under which researchers often operate. The quality of data collection is adversely affected by the conditions under which many researchers have little choice but to work. If 'good' qualitative research is to flourish, funders need to be educated with regard to the conditions under which expectations can be met.

The study also illustrates the inevitable tension in participative and action research projects between research as data collection and research as development work. Activities geared to empower educators and promote positive changes in their practice are undoubtedly desirable. It may be necessary to recognize, however, that the attitudes and skills fundamental to effective data collection are learned competences, and make provision for their acquisition.

The multiple understandings of the term 'fieldworker' in the literature were reflected in the findings of this study. This is a matter of concern because slippage between different definitions of 'fieldwork' can lead to inappropriate expectations of fieldworkers and poor data. Ethnographic fieldwork is a very different task from simple questionnaire administration and the person who is capable of the latter needs a longer and different kind of training in order to become capable of the former. Moreover, as researchers pointed out, even the simplest fieldwork task requires a certain amount of judgement. The quality of research would be enhanced by a common understanding of the fieldworker role within the educational research community.

Confusion regarding the capacities of fieldworkers is compounded by the apparent absence of clear roles and career paths for research assistants and research fieldworkers. Fieldworkers in educational research, in this study at least, tended to be transient, temporary staff who understandably sought out more lucrative career opportunities. The distinction was noticeable between fieldworkers who were being groomed for eventual roles in the academic world and fieldworkers for whom this was simply a temporary job. Academic opportunities are scarce, and the need for fieldworkers who are familiar with the language and contexts to be studied is substantial. It may be important, therefore, to create career path, and possibly even some form of certification, for the type of fieldwork that can legitimately be carried out

by fieldworkers who are not 'academics in training' and to clarify exactly what can and cannot be expected of such employees.

Qualitative research in education is not all that is required. But it is an important strategy for accessing the perspectives of a variety of stakeholders and capturing the reality of particular contexts. Its status, and the seriousness with which its findings are regarded, can only be enhanced by the measures proposed above to address issues affecting its rigour and consistency.

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