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A confessional account of the community entry phases of a critical ethnography: doing emancipatory ICT4D work in a deep rural community in South Africa

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In this paper I reflect on the community entry phases of doing critical ethnography in a traditional Zulu community in a deep rural part of South Africa. I present my reflections in the form of a confessional account on community entry and on how an ICT4D project was introduced in the community. The primary research question that guided my engagement in the project is: *In what ways should I achieve self-emancipation, in order to ensure the on-going emancipation and empowerment of the people I engage with*? I thus argue that the emancipation of the researcher is a precursor for the emancipation of the researched. The paper is practice-orientated in that it demonstrates how community entry was established in a particular situation, how community entry encounters informed follow-up work, and how cultural interpreters empowered me to do community entry successfully. Through confessional writing I reflect on the beginnings of criticality in fieldwork practices and how I recognised, exposed, and articulated my own inabilities, social entrapment, and need for emancipation in ICT4D work. The paper concludes with guidelines for ethical community entry conduct in situations similar to what I encountered and for doing critical research at the grass-roots level of practice.

Keywords: Community Entry, Critical Ethnography, Self-emancipation

Introduction

The purpose of this paper is to reflect on how critical reflexivity and worldview collisions manifested during the community entry phases of an Information Communication Technology for Development (ICT4D) project in a traditional Zulu community in a deep rural part of South Africa. I also reflect on how I pursued self-emancipation *in* the process and as a result of the process of community entry. I present a confessional account of critical ethnography, where I demonstrate the beginnings of criticality in fieldwork practices and how I recognised, exposed, and articulated my own inabilities, social entrapment, and need for emancipation. I use confessional writing to show how critical reflexivity manifested in the situation and how I, as a primary

research subject, evolved as critical researcher. I show how community entry was established in a particular situation, how community entry encounters informed follow-up work, and how cultural interpreters and development agents empowered me to do community entry successfully and ethically.

The paper is structured as follows: In the next section I present the research context and problem situation, and the research question that guided the study. I then discuss critical ethnography and critical hermeneutics as it pertains to my work. The value of confessional writing for presenting reflections on critical ethnographic work is then explained. The paper's primary contribution is then presented in the form of a confessional account on community entry. The paper concludes where I revisit the research question and reflect on guidelines for community entry and critical research practice.

The research context and problem situation

The greater research project (and also my PhD work), of which this paper forms part, evolved from my ethnographic immersion in the Happy Valley Project (pseudonyms are used for people and places throughout this paper). In partnership with several key community members and development agents (or agents of development), I have since 2008 been involved in the many aspects of community engagement and ICT training that have evolved since the inception of the project. As ICT4D practitioner, my role was (until December 2011) that of the primary driver and outsider champion of the Happy Valley Project. This involvement includes being part of how the project started and gained momentum, how relationships with teachers and key community members developed and matured, how key community members were empowered through ICT and train-the-trainer initiatives, how the ICT training slowly progressed towards becoming sustainable and community owned, how project stakeholders (myself included) were empowered and delivered from false consciousness and cultural entrapment (Thomas, 1993), how I was inspired through relationships with the community and lessons learned from living amongst the people for periods of time, and how I learned to approach ICT4D research and practice ethically.

From an ICT4D project management point of view, I presided over activities such as preparing project proposals, acquiring international funding, implementing ICT4D, empowering development agents through ICT training initiatives, project reporting and feedback on ICT policy, and after-implementation service and support of gatekeepers and development agents (see *reference to be added after acceptance*). My role in the project evolved from being a doer of ICT work and training initially, to someone who was later consulted for guidance, quality control, and certification.

Ethnographic relationships in the project were focussed on those informants who played a caregiving, agency, visionary, or entrepreneurial role in the community. Ethnographically my role evolved from initial community entry, to becoming-a-member, and to being recognised as a member of a community of development agents and caregivers in Happy Valley. Throughout this process, I became deeply involved in

the social phenomena (the project) that I investigated, i.e. I became the data, lived the data (Whyte, 1996), and was collaboratively part of data collection, interpretation, and analysis. Table 1 lists some of the key fieldwork events during the first twelve months and community entry phases of the project.

Date	Event	Purpose and lessons learnt
18 Aug 2008	The ICT4D project starts with a letter from Martha, our primary gatekeeper	Expression of needs and background to the Happy Valley community
27 Aug 2008	Martha visits the Department of Informatics	Presentation and background on the Happy Valley community, existing community development initiatives, possible ICT4D opportunities
10 Feb 2009	Setting up an appointment with a gatekeeper at the Department of Health	First summary of my initial understandings and ICT4D ideas for the Happy Valley project
19-22 Feb 2009	Four-day fieldtrip and fact-finding visit	First steps in topic discovery and enculturation, building first relationships, implementing first lessons learnt on community entry
6 Mar 2009	Presentation to a gatekeeper from the Department of Health	Learning about community engagement protocol
Mar 2009	Conversations with cultural interpreters	Reading and learning about community entry and community engagement
13 Mar 2009	First conference abstract on the project	Initial understandings and theoretical reflections on community entry, first conflicts and collisions articulated
14 Apr 2009	UNESCO project proposal	Summarising initial understandings of needs and realities in a project proposal, project planning based on expressions and understandings of needs and UNESCO's ICT Competency Standards for Teachers policy framework, implementation of lessons learnt (see *reference to be added after acceptance*)
Early April 2009	Mrs Dlamini invites us to do computer training for the school teachers during the June/July holiday	First signs of successful community entry, trust, and acceptance
30 Apr 2009	Grade 11 Campus trip	Grade 11's visit the University, lessons on hospitality and reciprocity, testing initial ideas with cultural interpreters

16 May 2009	Conversations with UNESCO project funder	Learning about UNESCO's development agenda, discourse with a project funder, starting to align the Happy Valley project planning with UNESCO policy, conflicts and critical perspectives on policy documents (see *reference to be added after acceptance*)
2 Jun 2009	First paper on the project	Preliminary literature review, initial reflections on community entry, ethical research practice, conflicts and collisions
20 Jun 2009	Initial UNESCO work plan completed	Final planning of community engagement activities and ICT training project in June/July 2009, implementation of lessons learnt, ICT4D project planning according to lessons learnt (see *reference to be added after acceptance*)
27 Jun 2009	UNESCO project starts	First steps in active participant-observation, a two-week ICT training project kicks off (see *reference to be added after acceptance*)

Table 1: Key fieldwork events during the community entry and topic discovery phases of the project

During early ethnographic immersion, three key problem issues emerged from fieldwork. Firstly, I realised my and some of my project partners' inability with regard to intercultural matters and understanding each other's worldviews, specifically against the background of trying to understand, interpret, and evaluate ICT4D work. Secondly, I realised my inability to do community entry appropriately and ethically, especially because of my lack of understanding of the cultural context, underlying values, emancipatory concepts and interests, and the oppressive circumstances that the people of Happy Valley find themselves in (I elaborate on this in the sections that follow and in other of my papers). The third issue, which emanates from the two prior problem areas, relates to an inability to interpret and explain the collisions (conflict) that emerged from introducing, aligning, or implementing ICT4D. Therefore, in addition to studying the interaction dynamics in the social phenomena and their social meanings, I also sought to understand, describe, and participate in emancipation and fieldwork collisions as they emerged from my involvement in the social phenomena, primarily because they were the key data moments of critical ethnographic work (Thomas, 1993; Myers, 1997). Throughout the project, I sought to understand the *process* of deciphering meaning, both in terms of understanding and articulating emancipatory concepts as well as understanding the worldview of research participants, and that which underpin their worldview, such as value systems and local emancipatory practices.

A central issue that emerged within me is how my own false consciousness (e.g. misunderstandings, conflicting assumptions, and untested motives, views, and approaches with regard to ICT4D work) affected assumptions about power, position, and roles in development discourses. I was able to attribute much of this to value conflicts, and conflicts in how people in the community and I perceived, valued, and evaluated ICT4D work differently. Through ethnographic methods and critical reflexivity I became aware of how these inabilities, collisions, and false consciousnesses emerged and were seen to be the result of cultural entrapment and ethnocentrism that I suffered from initially. Berger & Luckmann (1967) in Thomas (1993) describe cultural entrapment or social entrapment as the variety of mechanisms, emanating from one's own worldview, that are applied to assure "social harmony and conformity to interactional norms, organizational rules, institutional patterns, and ideological concepts" (p. 3) and which may affect assumptions about development and development discourses. Cultural entrapment may be accompanied by ethnocentrism which refers to the tendency of most people to think of their own culture as the best or most sensible (Harvey & Myers, 2002). In this study I argue that false consciousness regarding ICT4D research and practice is potentially rooted in a conscious or subconscious cultural entrapment on the part of people on both sides of the "development divide". False consciousness may ultimately lead to ICT4D failures and the on-going imposing of oppression sustaining values, beliefs, and ideologies onto the development situation. In my case, it was a problem that my project partners and I had to collaboratively expose and negotiate, in order to ensure ethical and emancipatory ICT4D.

A key argument that guided my work in the Happy Valley project, therefore, is that the emancipation of the researcher is a precursor for the emancipation of the researched. The question that I asked myself throughout the entire ethnography was (also see Krauss & Turpin (2013) and Krauss (2012)): *In what ways should I achieve self-emancipation, in order to ensure the on-going emancipation and empowerment of the people I engage with.* Although emancipation and social transformation occurred amongst the local people as a result of the project, the focus of this paper is on the first part of the question, namely the need for the outsider-researcher to be self-emancipated.

In the following section I discuss my methodological approach.

Critical ethnography and critical hermeneutics

Critical ethnography implies "an 'appropriation' and 'reconstruction' of conventional ethnography so as to transform it into a project concerned with bringing about human emancipation" (Hammersley, 1992: 96). Advocates of critical ethnography criticise conventional ethnography both for "adopting an inappropriate theoretical perspective that neglects oppression and its causes" and for not being closely related to practices designed to bring about emancipation (Hammersley, 1992: 96).

> "Critical ethnography is a type of reflection that examines culture, knowledge, and action. It expands our horizons for choice and widens our experiential

> capacity to see, hear, and feel. It deepens and sharpens ethical commitments by forcing us to develop and act upon value commitments in the context of political agendas" (Thomas, 1993: 2-3).

> "Critical ethnography sees ethnographic research as an emergent process, in which there is a dialogue between the ethnographer and the people in the research setting." (Myers, 2009: 96).

Essentially critical ethnography is ethnography underpinned by a critical hermeneutic philosophy (Myers, 1997) and performed by the critical social theorist. Because of cultural entrapment, there is a good chance that the ethnographer may be unable to identify or "see" reality as the local people see it and therefore may be unable to decipher meaning or interpret and describe social phenomena (Thomas, 1993). Critical ethnographers attempt to address this issue – hence the need for the researcher also to be emancipated. They "tend to open to scrutiny otherwise hidden agendas, power centres, and assumptions that inhibit, repress, and constrain" (Thomas, 1993: 3). Critical ethnography aims to address the emancipation of people through enlightenment and other means (such as seeing their true interests and situation), so that they are able to recognise and pursue their emancipatory interests (Hammersley, 1992; Gordon et al, 2001). The construction of social life is seen as constructed in contexts of power and oppression (Myers, 2009). Critical ethnography does not only attempt to describe people's perspectives and behaviour, but also to explain them (Hammersley, 1992) and respond to them.

The focus of critical ethnography is on absurdities, contradictions, oppositions, tensions, discrepancies, and conflicts in the social situation (Thomas, 1993; Myers, 1997).

> "For critical ethnographers the limits of relevant data may seem to close in much tighter and sooner, because we are looking at topics for which conventional native accounts may not always be sufficient when answers are pre-patterned rhetoric that reflect learned accounts rather than actual reasons" (Thomas, 1993: 38).

Devising ways to gain access to deeper meaning and conflicting and contradicting accounts may present challenges to the ethnographer's creativity, flexibility, and innovation (Thomas, 1993; Alvesson & Sköldberg, 2000). The collisions, conflicts, contradictions, etc. that I sought to understand as part of my ethnographic data, emerged to be the result of worldview collisions and manifested as value conflicts.

I used critical hermeneutics in the process of interpretation. Critical hermeneutic philosophers recognise that the act of interpretation is never closed, because there is always an alternate interpretation (Harvey & Myers, 2002; Taylor, 1976 in Myers, 2009).

> "Critical hermeneutics recognizes that all human interpretations are shaped by political, economic, and social contexts; this introduces a bias that critical hermeneutics tries to overcome by reflection and discourse." (Myers & Klein, 2011: 23).

A critical theorist questions the underlying assumptions embedded in meaning and therefore also critiques the process and result of the interpretive act, i.e. the process of interpretation is self-critically reflected upon (Ricoeur, 1974 in Myers, 2009). "Critical hermeneutics is … aware of the double hermeneutic and acknowledges the reflective critique of the interpretation applied by the researcher" (Myers, 2009: 191). The post-modern hermeneutic, for example, views all alternate meanings as equal. The critical hermeneutic disagrees in that it is possible to judge between alternate explanations, although it may not be correct and may change over time (Myers, 2009). It is here that value judgements play an important role (Myers & Klein, 2011). Critical hermeneutics requires that the researcher becomes aware of his own historicity and prejudices (Harvey & Myers, 2002). Critical hermeneutics also acknowledge the possible constraints in which human communication may take place and therefore attempts to mediate the interpretation and the context in which communication takes place (Myers, 2009; Myers & Klein, 2011).

About confession writing

A confessional account of ethnography is "an attempt to explicitly demystify fieldwork or participant-observation by showing how the technique is practiced in the field." (Van Maanen, 1988: 73). Confessional writing highlights the ethnographer's experience of doing fieldwork by giving a self-revealing and self-reflexive account of the research process (Whyte, 1996; Van Maanen, 1988; Schultze, 2000; Myers, 2009). It "presents the ethnographer's role as a research instrument and exposes the ethnographer rendering his/her actions, failings, motivations, and assumptions open to public scrutiny and critique" (Schultze, 2000: 8). The strength of confessional writing is that the narrator is able to leverage both the ethnographer's and the readers' experiences (Schultze, 2000) also with regard to criticality and emancipation.

Part of the confessional account is that the researcher acknowledges and reflects on his or her sometimes embarrassing ignorance and mistakes in ethnographic practice and how his/her view of reality has changed to where the ethnographer sees things differently at the conclusion of the research – almost like a character-building event (Van Maanen, 1988; Whyte, 1996). An important aspect of a confessional account, however, is that towards the conclusion, the researcher and the social phenomena should "find" each other despite the initial mistakes, blunders, and misunderstandings (Van Maanen, 1988).

A confessional account of ethnography presents attempts to bring the self-critical process to the fore of research, as well as to reflect on one's own relation to the knowing object (Bourdieu, 1990). A confessional account of presenting the research process is emancipatory for three reasons. Firstly, in line with the epistemology of critical social theory, confessional writing can be used to demonstrate the self-reflexivity and self-critique of the researcher as he or she changes and is challenged in the process of doing fieldwork (Van Maanen, 1988), and discovers and pursues the emancipatory interests of both the research participants and researcher (Whyte, 1996;

Schultze, 2000). The reader then also learns about the researcher's shifting points of view as the story unfolds (Van Maanen, 1988).

Secondly, the researcher puts himself on par with the research participants who may feel exposed or criticised by ethnographic work (Whyte, 1996; Schultze, 2000). This deals with the need for addressing the issue of power relations in fieldwork and discourse, which is necessary according the mandate of the critical theorist (Van Maanen, 1988; Ngwenyama & Lee, 1997; Čečez-Kecmanović, 2001; Myers & Klein, 2011).

Thirdly, confessional writing attempts "to draw readers into the text so that the assumptions and practices of the 'foreign culture' serve as a mirror in which the reader's own assumptions and practices are reflected" (Schultze, 2000: 4). Confessional writing therefore potentially also has an emancipatory effect on the readers.

A critical confessional account of community entry

In the sections that follow I present a confessional account of how community entry evolved in the Happy Valley project and on my discovery of the need for self-emancipation while *doing* critical ethnography. In the confessional account I demonstrate the beginnings of criticality in fieldwork practices and how I recognised, exposed, and articulated my own inabilities, social entrapment, and need for emancipation in ICT4D work. I also demonstrate some guidelines for community entry, my critical orientation to knowledge, and I reflect on the role of cultural interpreters in establishing community entry. I use confessional writing to show how critical reflexivity manifested and how I, as ethnographer and primary research subject, embarked on the journey of social transformation.

I start the confessional account by reflecting on who I am and possibly how my historicity and prejudices informed the research situation. I then reflect on how the ICT4D project started and the lessons that I learnt from my initial cultural and research mistakes and from exposing my own ethnocentrism in the process. I thereafter demonstrate how I continued with community entry, implementing lessons learnt from my first ethnographic encounters. I conclude the confessional account with an "analogy" of how community entry and ICT4D should not be done. Throughout the confessional, I try to expose my initial failings, inabilities, and cultural entrapment, thus highlighting the need for the researcher and practitioner to also be emancipated before being able to adequately do emancipatory ICT4D work.

Who I am

A key principle of doing critical ethnographic work is the need to reflect one's own historicity and prejudice (Myers, 1997; Klein & Myers, 1999; Alvesson & Sköldberg, 2000; Harvey & Myers, 2002; Myers, 2009; Myers & Klein, 2011) and how it could possibly affect the project situation and what is encountered in the field. I believe that even topic discovery and my choice of research paradigm were affected by who I am

and where I come from (Walsham, 2005, 2006). I thus affected how themes developed and how they were interpreted (Bourdieu, 1977, 1990; Whyte, 1996; Walsham, 2002).

I come from a relatively average middleclass home in a suburb of Cape Town. The fact that I grew up half Dutch and half Afrikaner exposed me to different cultures in a single home. This was sometimes frustratingly different from the mono-cultural friends and neighbours in our community. In many ways, however, I adopted an Afrikaner culture. I completed high-school in 1991. My schooling, therefore, included all the associated privileges and opportunities of white people in Apartheid South Africa. I was also exposed to the cultural entrapment that Apartheid offered us and the ideologies enforced onto us by the Apartheid government, for example, the belief that Apartheid was practical and safe. I observed many white people in those days indoctrinated to the point where they deliberately isolated themselves in communities of illusion regarding Africans and African cultures.

As children we were not allowed to mix and learn from each other. The issue of class distinction was quite prominent therefore. Although it remains quite embarrassing to admit, I noted that many Afrikaner people generally perceived Africans as lower class, underdeveloped, ignorant, or uneducated. In Apartheid South Africa, class segregation was enforced along racial lines. Bourdieu describes this as symbolic violence where the dominating group perceives the dominated group's lifestyle from a reductive and destructive point of view (Bourdieu, 1998). As a result, the dominating group simply avoids learning from or about the dominated group. Bourdieu (1998) confirms my observations to a certain extent as he explains that because people function in different social spaces (employers vs. workers, educated vs. unskilled, Afrikaans vs. Xhosa, and so forth), they also have little chance of physically meeting each other. Also, when they accidentally meet each other, they will not get on together, will not really understand each other, and will not appeal to each other. Even now, 20 years into liberation, I still see similar collisions between cultures. Today, however, it is not so much only a racial distinction, but rather a migration to a class distinction and collisions between lifestyles and worldviews.

My undergraduate studies were in Information Technology, after which I completed an Honours degree in Higher Education. While doing my Honours degree I was also offered a junior lecturing position at a university in Cape Town. My Masters studies, which I started in 2003, involved a highly interpretive study on the tacit nuances of visual communication, visual aesthetics, and web design, using theories from cognitive psychology. It was especially during the many interviews that I did with web and visual designers that I had to develop strategies for seeking out subconscious and deeper meaning from what they gave me, even to the point where I was able infer from them principles that they were not consciously aware of or able to articulate (*reference to be added after acceptance*). This exposure in the field of Human-Computer Interaction and my background in Higher Education, I believe was a preparation for my PhD work in a culturally different community.

I experienced a number of difficulties during the community entry phases of participant-observation. Initially two key issues stood out, namely, the difficulties associated with intercultural communication and some ideological remnants associated with the Apartheid legacy. Because of Apartheid, I was initially somewhat oversensitive to race-related differences, mainly because I didn't know how the Zulu people felt about the issue. However, my apprehension very quickly dissolved as I made friends with local people and learnt about the richness of diversity. A more challenging issue was that of learning new cultural mannerisms (and unlearning others). During the early stages of enculturation, which is a specific phase in participant-observation during which one has to come to terms with a new cultural situation (De Vos et al, 2007; Myers, 2009), some of the cultural informants told me that because of my Afrikaner way of communicating, I unintentionally offended some of the more traditional locals (I reflected on this issue in *reference to be added after acceptance*). It caused me to reflect very carefully on my own behaviour and assumptions. At times I even experienced a sense of insecurity in this regard.

As I progressed from enculturation to being-a-member, I experienced what Van Maanen (1988) contended; that is, "… a description of culture can never be settled once and for all" (p. 45). I, therefore, found myself studying a "moving target". As I learned about the Happy Valley community, their caregiving nature and the associated emancipatory practices, I adopted many of their values and principles in my own life. As I matured in the research situation, I experienced a gradual escape from the cultural entrapment that my own background and culture afforded me. I became accepted into a community of caregivers in Happy Valley, because although I was different, the locals seemed to discern my motives and attitude. In addition, being a married man, with children and in my late 30s offered me a type of social status associated with responsibility and leadership that was easy for traditional Zulus to relate to. My historicity, age, social status as married man, and position of outsider champion in the project affected the type and depth of data that could be collected and the interpretations I could make. Moreover, being who I am allowed me to build relationships with more influential community members in leadership roles, which a younger or single person probably would not have been able to do. It affected the type of trust and rapport that I could establish with people and the types of stories people told me.

I believe life has taught me the social skills needed for gaining access and maintaining access to the people of Happy Valley. As Walsham (2006) noted, it is not something that someone could teach me, but life necessitated me to confront my position in this respect, "through self-reflection and with input from others" (Walsham, 2006: 322).

How the Happy Valley project started

My engagement with the people from Happy Valley came as a rather unexpected opportunity in 2008. In July of that year I moved to Pretoria to take on a new lecturing position at the Department of Informatics. There I learnt about their strong ICT4D research stream. In support of the initiative, I suggested that we consider getting

involved with the Happy Valley community, basically only because I knew about them and of someone who could possibly be a gatekeeper to the community. My knowledge of the community and its people, however, was based on stories of suffering and the HIV pandemic, told by my Afrikaner friends working at the Care Centre for Orphans and Vulnerable Children (CCOVC). I had also met some of the orphans who were directly infected and affected by HIV. This initial perspective on the community created in me a level of distant sympathy, which subsequently affected the assumptions I had about myself, my position of power and knowledge in the project, and how I initially thought I could contribute.

I visited Happy Valley a few times prior to 2008, but it was only to see my friends and nothing more. During one of those visits in 2006, I had a somewhat disturbing encounter with two of the local Zulu boys who wanted to throw stones at us. I reflected on this encounter in (*reference to be added after acceptance*). It is the type of story that I can never forget because of the impressions it made on me.

Research-wise, things started to change for me when I suggested that Martha, the project manager from CCOVC and someone who also became our primary gatekeeper during the community entry phases in the project, should visit our department to give us some background on the Happy Valley community. The idea was to strengthen our department's ICT4D interests and in some way become involved at Happy Valley. So, on the 27th of August 2008, Martha visited our department to do a presentation on the Happy Valley community and their needs. Although I vaguely considered PhD research in Happy Valley at that stage, I mostly only viewed it as part of our university's community engagement mandate. Coordinating the Happy Valley ICT4D project, however, fell into my hands.

Similarly to Whyte (1996), the project therefore "came to me" on unscientific grounds and I pursued it even before I knew that it would become my PhD research. There were strong elements of chance, luck, and serendipity (Walsham, 2006). As a result, the Happy Valley project remained the primary reason for my engagement with the people of Happy Valley. My PhD research almost latched onto to the project, rather than the other way around, where ethnographers typically have a research agenda and where some initiative evolves from the research (LeCompte & Schensul, 1999).

Martha's views on the Happy Valley community were based on her experience as member of the community for more than 20 years. Martha is well-accepted and loved by the locals, whose language and habits she has come to know. Martha grew up in a Western environment and being well-educated and coming from a teaching background, she was able to articulate and explain the cultural nuances both as insider and outsider. During our first visit and during community entry she made great effort to inform us about the not-so-evident cultural differences, and sensitised us to some of the basic practices of respect.

Martha has also been involved in several successful community upliftment projects, including Happy Valley School and CCOVC. She, therefore, also has an intricate knowledge of the concerns and needs of the community, the socio-economic impacts of

the HIV pandemic, and the realities of hopelessness. She could confidently talk on topics such as community entry, community engagement, the local value system, and sustainability as well as the difficulties of intercultural engagement. She is fluent in isiZulu, isiXhosa, Afrikaans, and English and because she is embedded in both cultures, she was especially good at articulating and explaining cultural contrasts in ways understandable to me. People like Martha helped me to understand the unofficial account of the social situation.

Initial mistakes with a gatekeeper

Shortly before our first visit to Happy Valley in February 2009, and shortly after we learnt about the effects of HIV and health issues, I thought it wise to proactively involve or at least acknowledge the Department of Health (DoH) as a partner in the project. I was honestly trying to establish some collaboration with the DoH from a strategic point of view. Little did I know that I was going to step into an intensive fieldwork lesson on gatekeepers, interviewing gatekeepers, and community engagement protocol. What complicated things for me in this story was that because it was very early in the research, I didn't have a proper understanding of the community yet (i.e. no proper needs analysis was done), I was still in the process of discovering a topic, and I still had certain unchallenged assumptions and beliefs about my position and knowledge in the project and how I could contribute.

So to involve the DoH, I followed up on some prior contacts of mine at DoH. I knew Mrs Ndlovu, a human resources manager at the DoH, and Kebashnee Naidoo, who was involved in the training of nurses. I thought it to be a good idea to approach them again to establish their interest and buy-in into our initiative. So I phoned Kebashnee, because I knew she has good access to Mrs Ndlovu, her boss and asked her for a meeting appointment. I prepared a brief summary of the preliminary project intentions and emailed it to them (this was before we visited Happy Valley for the first time on 19 February 2009) (see Table 1). This meant that I only had Martha's inputs to base my initial project intentions on and a little bit of what I thought to be "common sense" about ICT4D. I prepared a presentation on my ideas which I would eventually presented to them after our first visit in February, when I hoped to have a better sense of some of the key issues at Happy Valley and how we could engage.

They were willing to entertain me for an hour on the 6th of March. However, from the moment I walked into the meeting, I could sense a resistance on their side – especially from Mrs Ndlovu. I told them about our involvement at Happy Valley and Njalo (a hospice at the Happy Valley community working with patients suffering from HIV and tuberculosis (TB) infections) and some of our intentions. Throughout the presentation there was an awkward silent response. I felt that I was doing something wrong but couldn't pin-point it.

When I finished my presentation, Mrs Ndlovu told me what bothered her about what she understood we were doing. With the benefit of hindsight and now having learnt many lessons since that engagement, I realised that I made a number of serious

mistakes. Two issues stood out. The first is that my pre-presentation context write-up which I emailed to her on the 10th of February, was pre-mature and that I had very little understanding of the political intricacies associated with health and HIV in South Africa at that stage. The second is that I approached Mrs Ndlovu in total ignorance regarding her position as gatekeeper and human resources manager. Although I started to learn about acknowledging and respecting the position of gatekeepers, I was still unable to practice it. I haven't had the opportunity to make mistakes and I went into this first encounter blindly and without the guidance of a cultural interpreter.

When I look back (reflected on) at the way I wrote my email to her (see below), I can clearly see a sense of supercilious arrogance and untested assumptions in my efforts. I was presenting myself and the project ideas without proper acknowledgement of her as owner and gatekeeper. I was asking her for her buy-in and support, almost as if she had to simply give a stamp of approval on our business. Although I was trying to portray a sense of pro-activeness, commitment, and expertise, I was making the mistakes that Willoughby (1928), Lewis (1994), Weyers (2001), Phahlamohlaka & Lotriet (2003), and Zheng (2009) were warning their readers about. I was pushing my own ideas that I thought were good based on my own perspectives while insisting on the DoH's participation as if they just had to approve our efforts.

> *"Our department has engaged in a community development initiative in Happy Valley and HVH [Happy Valley Hospital]. We are, amongst other things, researching an Applied Computer literacy course for nurses (at NQF level 5 and certified by the University) that is geared specifically to rural nurses. In collaboration with Njalo, we will incorporate nursing specific computer skills such …*

> *… On 19/2 we will visit Njalo and Happy Valley Hospital [HVH] to iron out some details and to discuss a way forward. Hopefully, depending on the availability of funding and infrastructure, we will be able to present the first course this year as a pilot for further work. Obviously, we haven't worked out all the details and we are still in need of funders and partners. …"*

Looking back now, it was especially the next part of my email to Mrs Ndlovu where I noted my own ignorance and arrogance.

> *"What I want to propose to you is to become involved in developing such a course so we can incorporate your and especially your nursing fraternity's perspectives. We need the Dept of Health's support in this endeavour. …*

> *I aim to bring along someone from HVH … as well as some of my colleagues involved in this project. If Mrs Naidoo can be available we can tap her perspectives on nursing training."* [Email to Mrs Ndlovu: 10 February 2009]

I didn't ask her for advice and didn't give her the sense that I acknowledge her as the gatekeeper in the initiative, especially with regard to gaining access to the nurses. As human resources manager, it is her responsibility to oversee training at the DoH. Who was I to insist on some community project? I was treading on unknown ground

politically. Also, since I didn't know the community of Happy Valley very well then, I conflated the mandates of Njalo and Happy Valley Hospital (HVH). HVH is a public hospital under the jurisdiction of the DoH, while Njalo was a hospice working in a more private capacity. I was in fact engaging with Njalo, rather than HVH. The message got through to Mrs Ndlovu differently. In fact, Martha later told me that Dr Smith, the chairman of Njalo, had to do some "damage control" because I gave the impression that he was making arrangements on behalf of HVH, which was not the case.

Mrs Ndlovu, in no uncertain terms, reprimanded me about being in no position to address health issues. "Don't mention XDR-TB [Extreme drug-resistant tuberculosis] and HIV as the context". "Do not mention things you don't know anything about". I felt stupid. I realised that although HIV and TB might have had an impact on the community, it is not my place to research or present facts and statistics on issues of health as I am not an expert. The best I could do is to present the perceptions of those that deal with it as a starting point for understanding the Happy Valley community. Facts and perceptions are two different points of departure. I will have to focus on the latter. Martha also later told me that the official view of the South African DoH at that stage (2008/2009) was that HIV does not necessarily cause AIDS, and that it might have contributed to Mrs Ndlovu's reaction. I will, however, never know what really happened there and what went through Mrs Ndlovu's mind. I walked out of her office only to take along the lessons I learnt on research protocol, and never to engage with the DoH again.

I learnt valuable lessons about the principles of doing interviews with a gatekeeper and community leader. I learnt how to reflect on my own position in an interview, to recognise ownership and leadership, and how to request guidance rather than insisting on buy-in. With Mrs Ndlovu I just barged in with something I thought to be a good idea. I did a weak needs analysis. I also think Mrs Ndlovu probably expected some arrogant attitude or motive from me similar to others (like Willoughby (1928), Lewis (1994), and Zheng (2009) explained) who have done or presented similar initiatives (in retrospect, I could can see it in my own email to her) and therefore she was reluctantly critical of my motives and approaches.

How did I rectify the interview situation in the heat of the moment? Well, after Mrs Ndlovu's reprimand, I responded something like: "Well, I have to ask you for advice then." That seemed to make Mrs Ndlovu ease up. She then explained some things to me about the context of IT training, nursing, and some of the realities at DoH – things I should've asked her about in the first place. She explained the problem of migrant workers and polygamy. She also gave me some contacts of people. However, I did not record much and neither remembered much. For me the meeting felt like a dead-end. I just wanted to leave the meeting to go and ask someone from Happy Valley how to interpret what had just happened.

After many months of reflection I discovered that my being proactive, strategic, and committed in this first contact, is in fact typified by how I and many other Westerners portray their identity and self-respect. In fact, the different and conflicting value

systems of the Zulu and Western cultures became a key source of collisions that I had to negotiate and reflect upon throughout my studies. Similarly to Stefan's attitude (a story told later), I was trying to convey to Mrs Ndlovu, who is a Zulu, that we are ready, organised, willing, and positioned to do a good job, or ready to "perform" well, while at the same time I was subconsciously expressing my "good intentions" in a Western way and based on a Western value system. Part of what I was subconsciously doing, was to show Mrs Ndlovu that I had self-respect and could be trusted. However, I was being destructive as Martha explained to me much later. Mrs Ndlovu and my growing ability to be self-reflexive made me stop in my tracks.

Luckily for me, my mistakes were outside of direct contact with the community. I had some very understanding and patient gatekeepers at Happy Valley who seemed to shrug off what had happened. I was therefore fortunate to make my mistakes in a context that didn't affect future efforts. I didn't engage with the DoH anymore after that and considered it more sensible to align with gatekeepers and agents who already had some arrangement with DoH. I was determined to fit in with existing initiatives of development agents, rather than trying to create a new initiative and in the process make the mistakes others made before. I felt embarrassed and humiliated because I realised afterwards that I was doing exactly that which Martha had said one shouldn't do as outsider and what Lewis (1994) and Willoughby (1928) advised their readers about. However, it was a learning experience where I could practice what I learnt also in the context of doing an interview with a gatekeeper.

Now, after my exit from the community, I realised the value of making these mistakes. Is there any advice to give to prospective researchers wanting to pursue similar situations? Yes, go and make your mistakes. I do not believe there is a better way to learn the tacit nuances of engaging with community gatekeepers and leaders. But, do not overestimate yourself and do not assume that you know what you are doing. Be critically self-reflexive about your own position and role in the project. Start by listening, acknowledging, and asking questions, know your position, remain open, ask for advice and guidance, make sure to know your interviewee's position and acknowledge it, and if possible align with a cultural interpreter or a development agent as partner - and, I suggest that you also think about the disruptive effects of not being self-reflexive (Howcroft & Trauth, 2005).

My next two letters to another gatekeeper had a totally different composure. I was writing to Mrs Dlamini, the headmistress of Happy Valley School, to make arrangements for the teacher training project for which UNESCO offered us a grant – this was after she had invited us to do computer training with her teachers (details from this part of the project is presented in *references to be added after acceptance*). I had learned from my mistakes and acknowledged Mrs Dlamini as gatekeeper and according to her position, establishing myself under her leadership. Moreover, I made the effort to visit Happy Valley School in February and I entertained her Grade 11 learners at our campus. Already there was a process of reciprocity taking place. In the email below I underlined the parts where I noted my own change in attitude:

> *"Dear Mrs Dlamini*
>
> <u>*We need your advice and feedback on the teacher training course.*</u>
>
> *As I indicated earlier, UNESCO has given us a grant to cover the costs of doing a computer training course at Happy Valley School. Part of their requirements for the funding is that we 1) present a detailed workplan what we intend to do, 2) that we do a press release, 3) that we advise them on their IT training policy framework and 4) that we give detailed feedback on the teacher training and possible future projects. We as academics would also like to see if we can generate some research from the teacher training activity and maybe plan future training and activities. UNESCO is keen to also fund further IT projects and we should plan for further funding.*
>
> <u>*I have attached a draft workplan for your feedback. It is certainly only a draft and we would like to have your inputs and suggestions. We need to know how we can support Happy Valley School with future training and IT projects.*</u>
>
> <u>*Please look at the proposal. We can discuss it by the end of next week to see how we can support you with future projects and maybe work together with Njalo to support their training needs.*</u>
>
> *Yours truly "* [Email to Mrs Dlamini: 23 June 2009]

Similarly, in an email to Mrs Dlamini on the 12th of June 2009, I also aligned myself under her position as gatekeeper by explicitly acknowledging her leadership and expertise. I started the email in the following manner:

> *"Dear Mrs Dlamini*
>
> *Here are my thoughts about the train-the-trainer initiative. Please advise if you would like to add something. We really need your ideas here because you know the teachers and community very well:*
>
> *Our intention with the train-the-trainer initiative is to give teachers and the school an opportunity to carry-on with training even if UP is not available.*
>
> *…"*

I ended the letter as follows:

> *"…*
>
> *Please also advise us on our approach...*
>
> *Best regards "* [Email to Mrs Dlamini: 12 June 2009]

I did not assume this position in my email only to get things done. Through introspection and knowing my inabilities, I sincerely believed in Mrs Dlamini's leadership and that I needed guidance in the project. I had a growing realisation that I did not know how to do things ethically and culturally correctly in Happy Valley. I was realising my own need for empowerment with regard to ICT4D implementation in Happy Valley. Although I had changed and learned new things, I was also still behaving

quite formally since I had not yet become part of the community. For me it was enculturation in practice.

Practicing community entry

Our first fact-finding fieldtrip to Happy Valley (19-22 February 2009) was an overwhelming cultural event. We experienced hospitality far beyond what we are accustomed to in my culture. I was also confronted with information overload and as expected, my own inabilities in intercultural communication. As a group of four academics, we spent time with a number of individuals and groups of people in the community. It was, however, especially our time with Martha, Dr Smith, and the teachers from Happy Valley School that helped me formulate my initial understandings of the research situation.

During our conversations, Martha made considerable effort to explain community entry and how to introduce a development idea. She made a number of insightful statements which I wrote down and reflected upon very deeply after our conversations. The following is what I recorded in my fieldnotes after our conversations (I placed Martha's exact words in quotes):

> *"You cannot do something on their behalf. You can only propose." The community has to take the initiative in a development project. You only "step in when you are invited", otherwise the community will reject what you are attempting. "The community must experience ownership." "You can implement a R1 million project, but if the community does not accept it [and you], no-one will touch it." "People will not trust you on face value or what you can provide."* [Fieldnotes: 19 February 2009].

Regarding social structures Martha explained:

> *"Everything must be considered right on a social interaction level – it is more important than doing the thing correctly." "Zulus are courteous. If you 'take over' they will stand back and watch you. They will never snatch something and run with it. Westerners tend to take hold of something and run." "You must hand over the baton." If you make a mistake during these sensitive phases, "they might never trust you again".* [Fieldnotes: 19 February 2009].

It seemed that she spoke about these issues firstly, because she realised that we might need these types of guidelines and principles for whatever initiative would come from our engagement, and secondly, because she probably had to discover the same guidelines when she did community entry herself more than 20 years ago. She later confirmed this by noting that people such as herself have done community entry before in Happy Valley and therefore could be useful partners in our project, because "they are able to articulate contrasts".

During this engagement, Martha spent some time to explain how it was necessary to allow a development idea, from an outsider like myself, to become part of a community's social fibre. She gave an example by relating to the social structure of how

men from the community interact with each other. Figure 1 [from Fieldnotes: 19 February 2009] shows how I visualised Martha's explanation. She suggested that when one introduces or proposes a development idea, one needs to allow the different groupings of men to "play with" (tinker) and internalise the idea amongst themselves in the different groupings. At the same time, this idea will then also be discussed up and down the hierarchy. When they are ready, they will invite you to move in. An invitation normally is the first sign of successful community entry. It is only then when you should step in and live up to the suggestions or promises you made. This process seemed to emanate from a people-orientated or loyalty-based value system (see *reference to be added after acceptance*). The men in these groupings acknowledge and allow each other the space and time to grapple with, discuss, reflect, and voice concerns. Time lines and technical correctness does not dictate the process. Something is only considered complete when there is a collective sense of closure, understanding, and trust and when everyone have been acknowledged and respected during the engagement.
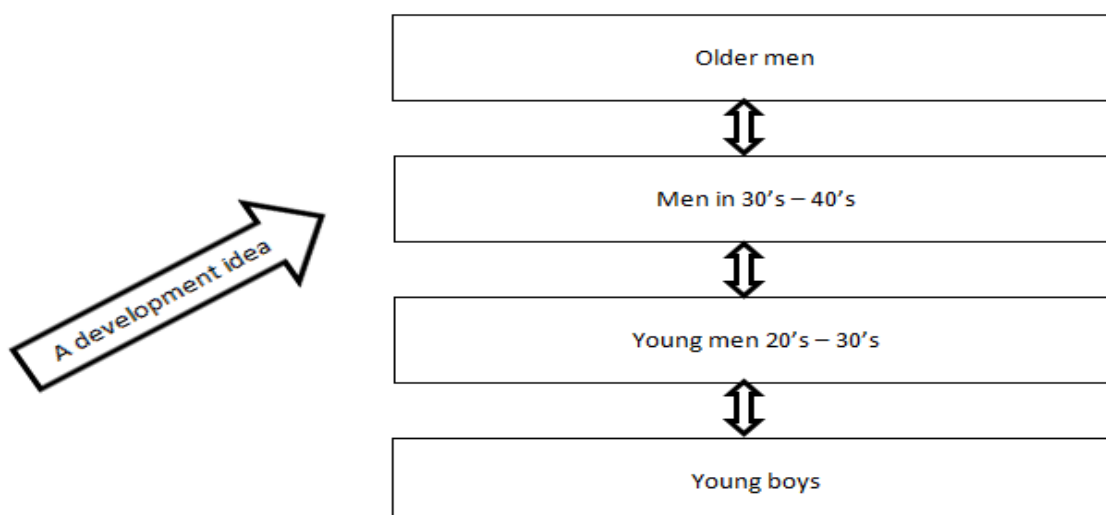

Figure 1: The social structure of men visualized

The following transcript from my conversations with Philani, a teacher from Happy Valley School and another gatekeeper with whom I engaged more, after I became a member, explains his view on how to allow a development idea to settle into the minds and structures of the people:

> *"Zulu people like to talk a lot about something – you need many gatherings. We are not people that understand things the first time, because we want to make sure and think about it. Gradually you need to learn about something. You need to explain yourself from the beginning. Some people from the government come and they have already been paid, and the people think that the project is not theirs. Our people are not that much ignorant. People want to be educated more than once. They need personal communication, like getting pension and standing in a row. Don't overpower the people. You do something without*

> *informing, then you don't respect."* [Interview with Mrs Dlamini and teachers: 6 July 2010]

I had to respect this process and allow for it to fully mature. It is not something that I could fast-track or force into maturity.

After Martha made me aware of this, I noticed this social structure several times. I also found myself naturally fit into the 30s to 40s grouping, relating easily to married men in that grouping. I had the added advantage that men in the 30s to 40s grouping were quite influential in the community on a practical level, which I believe made certain things relatively easy for me. Throughout the research no-one explicitly confirmed this social structure to me until much later when I asked Philani about it. He confirmed it and its importance in any decision making or social activity by giving me even more examples of it.

Since Martha was our primary gatekeeper we took her guidance on where to further engage with the community. During her presentation in August the previous year (2008) and a number of times after that, she suggested three potential areas where we could become involved as a department, namely Happy Valley School with Mrs Dlamini as gatekeeper, Njalo with Dr Smith as gatekeeper, and CCOVC with herself as project manager and gatekeeper. Her foremost choice and suggestion, however, was to engage with the school first. The day after our conversations on community entry, Martha set up an appointment with Mrs Dlamini the headmistress of Happy Valley School. I knew that this was my opportunity to test and practice what Martha explained to us and lessons learn from my engagement with Mrs Ndlovu.

At 7:45 am the next morning (20 February 2009) we were escorted to the school assembly where we were asked to address the children. It was their way to acknowledge and welcome us. Mrs Dlamini asked us to explain to the children what we were doing at the school. At that stage, I got the idea that she actually also wanted to know why we were there, because we had just met and didn't have time to talk yet. Personally, I found myself not being able to connect to the children at all. I was mumbling off something about the mandate of our University – something about teaching, research, and community engagement and why we were here. I was talking over the heads of children. I believe that Mrs Dlamini and the teachers got some idea what I was trying to say though, and maybe that was good. I can't remember what Solomon and Magrieta, my colleagues, had to say, but Jacob, our partner and an indigenous man from Zambia, was the one who was able to connect to the children. He told a story about how his father, as a boy, lent out his shoes to his fellow classmates for money, half-hour at a time. I didn't have stories like that, because of my middleclass upbringing. Martha later told me that because he is an African with similar mannerism "they [the learners] read him like a book" [Fieldnotes: 28 August 2009]. The children understood him quite well and could identify with what he said. I on the other hand, was struggling just to make a basic conversation with anybody. What made things worse was that I was supposed to be the project leader from the university's point of view. I still felt insecure about how to communicate with the Zulus in their context. I was glad, however, to have Jacob on

board. He was a good friend of mine and we therefore had the openness to discuss cultural mannerisms amongst ourselves. He was passionate and the perfect cultural interpreter for us. He was the face of the project at that stage.

After the assembly we spent some time with Mrs Dlamini in her office to discuss their needs and what we could offer in terms of IT training and support. Having Martha's advice we proposed that we could do computer literacy training for the teachers, but that as headmistress, she had to let us know if and when they are ready and how they suggest that we do it. Trying to implement what Martha had told us, I was acknowledging Mrs Dlamini as community leader while deliberately requesting guidance on how to go about, thus giving her opportunity to explain her ideas according her needs and understanding. I wanted her to experience ownership. Because I was still learning about my own limitations, I honestly also needed to submit to her leadership and guidance. Even in my email to her that I presented much later (see the previous section) I continued to recognise her as a gatekeeper and leader in the project.

We never insisted on doing specific things and only proposed. We also didn't discuss logistics, like timelines, dates, funding, and so forth. The *how* of the project was something that we were going to discover through innovation, tinkering, and bricolage (Ali & Bailur, 2007; Avgerou, 2009) much later. We proposed and waited. I reminded myself that based on the ICT4D literature I read (Weyers, 2001; Phahlamohlaka & Lotriet, 2003), the guidance from Martha, and observing Jacob's natural fluency, I am also in need of empowerment, especially with regard to intercultural matters, community entry, and the cultural and practical "hows" of ICT4D. I was going through an intense community entry experience. Mrs Dlamini just listened and took note of what we suggested. We had little response from her for a long time.

After the meeting Mrs Dlamini asked if we could visit the children in their classes. We agreed. Thabi took us from classroom to classroom, where in each we spent a few minutes talking and engaging. I was starting to relax and enjoy the process. Still there were awkward moments. One of them was at the Grade 12 group. When we got there the children seemed very excited at the opportunity to interact with us. I believe Mrs Smith, the teacher, wanted to create opportunities for the children to ask questions about tertiary studies. We introduced ourselves and then the questions came, probably about 45 minutes of conversation. One question from a child totally took me off guard. It was something like: "What if I go to university next year and some of the old white lecturers chase us away or shout at us when we ask a question? What should I do?" I was grateful for the openness, but had no answer. Firstly, I was probably perceived as an older white lecturer and secondly: what a frank question! Jacob had an extremely wise yet practical response. I honestly can't remember what he said and how he said it, but I welcomed his understanding of white people and his practical advice. I was sitting back and enjoying the scene that played out in front of me.

After our class visits we greeted Mrs Dlamini and off we went. I never realised it at the time, but the honest time we spent with the school children and the staff was an important part of establishing a relationship and cultural reciprocity. ICT was our forte,

but hospitality and relationships became our approach and cultural exchange rate (LeCompte & Schensul, 1999; Wolcott, 1995 in Myers, 2009). The fact that we were also willing to facilitate a campus trip for them in April that year, added to the reciprocity that was developing. The teachers wanted us to empower their children. As development agents, it was their passion and concern. We aligned with their agency interests and requests, even though it had nothing to do with ICTs per se. We supported them accordingly and acknowledge their motivations and constraints.

I believe that what we did at Happy Valley School was to implement Martha's advice and also to acknowledge the teachers as development agents. The teachers had certain emancipatory interests and practices as a result of their culture and the nature of their caregiving role in the community. Moreover, hospitality was emerging as a key emancipatory practice in the Happy Valley community. Our role as newcomers and outsiders was to simply align with them to collaborate with them to do their work better. Also, respecting their requests and needs and giving them time to accept us and the ideas we collectively came up with, I believe allowed them to profile us and establish whether we could be trusted. The fact that we spent honest and quality time with the children (i.e. without a task-orientated haste) and respected what was important to them, opened doors for further engagement. The process of allowing a development idea to become part of a community's social dynamics was unfolding in front of me.

Early in April 2009 Mrs Dlamini finally phoned me to request the computer training that we proposed and also that we facilitate a campus trip for the Grade 11 children from her school. For me that was the first sign of successful community entry. We were invited. Now we had to step in, align with Mrs Dlamini's and Martha's guidance and keep the promises we made, while at the same time seek to "hand over the baton". I suggested to Mrs Dlamini that we do a basic course and then an advanced course in the two weeks we had available during the June/July school holidays. She, however, requested that we repeat the basic course for two groups of teachers during this period. I submitted to her guidance and started planning the project. She became the project leader, we became the topic experts, and I became the outsider project guardian also in her eyes.

Looking back now, I know that Martha was influential in guiding me in the process of community entry and establishing a research topic. I believe her background and exposure made her talk about what she has observed others to fail in. She has seen many projects and good intentions come and go. After our successful first engagement I became aware of a story that turned out to be an analogy for typical Western cultural entrapment and that helped me remember how *not* to do community entry.

How Stefan offended the Happy Valley people

Very early in the project, before we participated in our first active ICT training intervention in June 2009, but shortly after we had our first visit, I met Stefan and Adrian, two Afrikaner men from Gauteng. Adrian is a retired man who seemed to have a great interest in the community of Happy Valley where he had been doing things for a

number of years. Stefan on the other hand was a successful businessman and in his late 50's. I never learnt how these two met, but both of them had quite an interest in helping the Happy Valley community. Stefan in particular had this very elaborate idea of helping everyone in Happy Valley to get a bank account and an ATM card. He also wanted the community to start a non-profit company to assist with development initiatives in the region and to create business opportunities. I observed Stefan as a man with quite a persistent and choleric personality, with strong ideas and opinions about things – a real salesman.

In our meeting where we were introduced to each other, we shared some of our ideas on how we could possibly collaborate in the Happy Valley community. I personally was giving my very early views on how we could do some ICT training. I was hoping to source some funding through these guys while at the same time gauging their motives and reasons for being involved. It seemed that they had some influence and enough passion. I invited Stefan and Adrian to join us to also share their ideas with our department on the 22nd of April.

After the meeting, I don't remember why, I got the idea to phone and ask Martha about Stefan and Adrian. I wanted to find out about how the community accepted them. Martha told me a story that became a benchmark learning event about how community entry should *not* take place. Apparently during one of Stefan's visits to Happy Valley he initiated a meeting with some of the local community leaders to discuss his ideas on a non-profit company and bank accounts for the people in the community. Although his intentions were probably good, he offended the community severely. Martha highlighted three things that Stefan did wrong in terms of the traditional community worldview.

Firstly, during the meeting which Stefan seemed to facilitate, he asked a man to keep quiet in order to give a woman an opportunity to speak. Apparently this was extremely offensive behaviour to both men and women in the meeting. According to the traditional Zulu culture, men are the decision makers, leaders, and guardians in the community and therefore also spokespeople of the community. Traditionally women never participate publicly in community matters. Although some might view this as a form of masculine domination, it had implications for community entry and gaining access. Secondly, Stefan was pushing very hard with an idea that he thought was good without giving the people enough opportunity to engage with the idea and to let it become part of their discussions and social fibre. He was pushing hard for deadlines and outcomes. The Zulu people wanted and needed time to play with the idea that Stefan proposed. He, however, was not willing to wait. He was not allowing for a development idea to settle in the community like I had learned to do. Thirdly, Martha told me that Stefan's idea of giving each person a bank account was not going work in Happy Valley. The types of income people earn were too low to justify the added expense of a bank account – Happy Valley has a cash economy. Moreover, a bank card and account is too much of an abstract (and probably Western) phenomenon to deal with. Also, the general trend is that money moves out of the town, rather than into it. For example,

people would draw money in Happy Valley and take a taxi to another town to spend it. Stefan's ideas were not feasible, not well thought through and he had absolutely no idea of the needs and realities that the people deal with on a daily basis. Stefan did no proper research or needs analysis before his engagement and at the same time was following Adrian's lead who himself didn't seem to know much about community entry. He was following the guidance of a misinformed agent.

It was especially Stefan's culturally offensive behaviour that totally shut the door for any further community participation, even up to the point where Adrian who introduced Stefan to the locals had to withdraw from the community – and that after several years of visits. The way Stefan did things is socially acceptable in the urban business culture in Gauteng. In fact, if you are not pushy, assertive and to point you will probably not survive in Gauteng. But it is not the way things happen in Happy Valley. Stefan was ignorantly unable to adapt his ways. Stefan and Adrian both fell silent after that encounter.

During Martha's account of what happened with Stefan, I realised that any perceived association between myself and Stefan, might jeopardise the fragile community entry and trust building stages that I was going through in Happy Valley. I was also concerned that Stefan might use the university connection to push his agenda. I told Martha about my suspicions. I asked her to clarify to the locals that I am only aware of Stefan, but that we do not collaborate in any way. I wasn't sure how to explain to Stefan his mistakes, neither was I in the position to do so.

So, after our meeting on the 22nd of April, one of my colleagues asked him why he was so passionate and interested in the Happy Valley community. His response was something like, "something big happened in my life. Now I feel that I need to give something back". It seemed that he had a life changing experience that made him reflect on his life and that his efforts in Happy Valley was his way to do something good. So even though he was sincere, had the passion and good intentions, he was offending and abusing the people of Happy Valley through the way he was doing things. Stefan was doing what Lewis (1994) had explained as supercilious development endeavours.

Stefan also related to an experience he had in Happy Valley. This story became an analogy of what Martha warned me about during my February field visit, i.e., "you can implement a R1 million project, but if the community does not accept it [and you], no-one will touch it. … People will not trust you on face value or what you can provide." [Fieldnotes: 19 February 2009]. During one of his trips he brought a big crate of food and other consumables to the mission. When he came there a month later he found the crate exactly there where he had left it. All the food had spoiled. Stefan was quite frustrated when he complained about it: "I cannot understand why nobody takes initiative and at least distribute the stuff". I knew what was going on though. The locals were doing what Martha had predicted. Because of Stefan's culturally offensive behaviour, they courteously ignored him and all efforts from his side.

In retrospect I believe that a big part of Stefan's actions is because of his strong choleric personality. I perceived this big man to be sincere, but he suffered from a form of

cultural entrapment, where he was set in his ways. I also came to think that maybe some people just can't do community engagement in a different culture, because of their personalities or lack of social skills (Walsham, 2006). I also realised that cultural entrapment in outsiders make them unable to do introspection and critically reflect about other's worldview and assumptions ... or maybe they just don't know how to shut-up and listen.

On the other hand his calculated and strategic assertiveness probably was his way of showing sincerity, commitment, integrity, and expertise. It was during this time that I started to play with the idea that outsiders wanting to do development are in fact entrapped in some form of false consciousness about what development is and how to do it. It seemed that the developed or the "haves", such as Stefan possibly find themselves in a position where they perceive themselves as successful. He was able to prove to himself that what he had done for many years is working for him and therefore should work for others (Lewis, 1994). But perceptions of achievement may also be a false consciousness in people like Stefan, because it causes you to believe that there is only one path to achievement and that being developed (such as having access to a bank account) is better, or in Stefan's case, that pushing hard to create business opportunities is a strategic route to development. For me the idea of self-emancipation of the outsider researcher and practitioner was emerging as a very strong theme in my research.

After this story I started to display considerable reluctance to involve outsiders, including funders, who were not willing or open to share my understanding or who I perceived as having ulterior motives or "strings attached" to their development ideas. For example, one of the funders I approached had certain conditions that the school had to abide by before they were willing to fund computer infrastructure. These conditions included that the computer training venue had to have burglar bars, the infrastructure had to be insured, and the school had to provide their own software. It was a problem for the school. Due to the difficulties associated with poverty in the community, these added expenses would just not be feasible. Crime also was not a problem in this traditional Zulu community. This specific funder, however, stuck to a one-size-fits-all mentality. I had to make a decision at the time and didn't even finish the application for funding.

Guidelines for ethical community entry conduct and introducing ICT4D

In the confessional account of how community entry unfolded, I demonstrated some guidelines for emancipatory ICT4D work in situations similar to what I encountered. The model in Figure 2 visualises the lessons learnt from the community entry phases of the project.
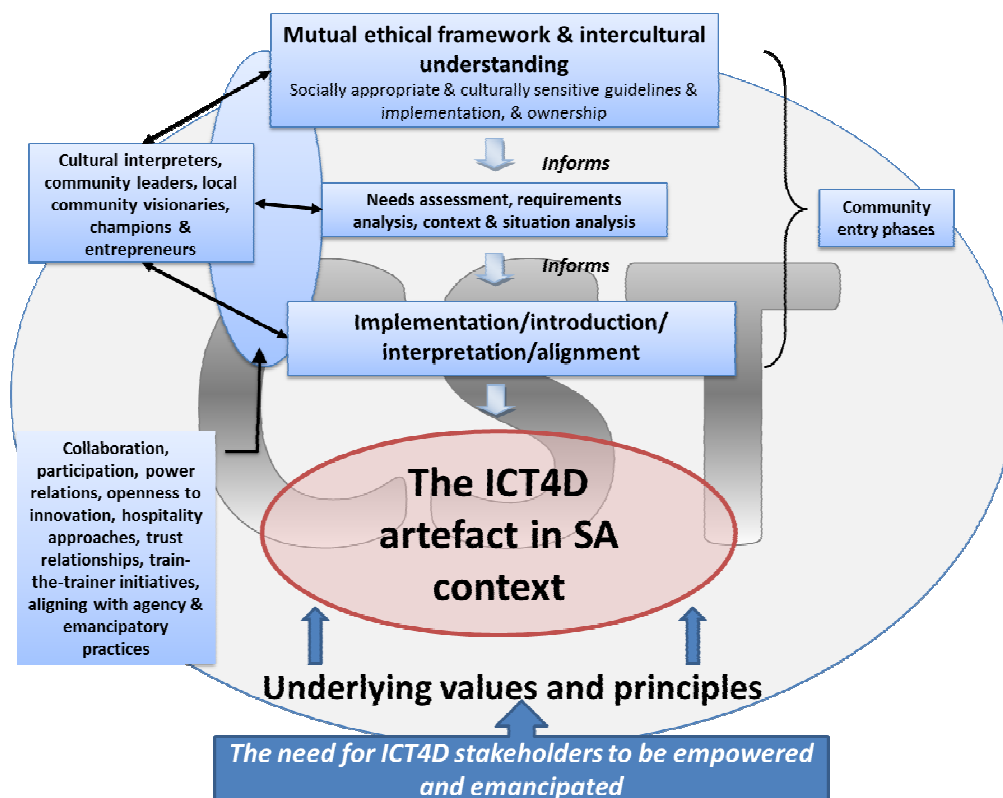
Figure 2: A model for ethical community entry conduct and introducing the ICT4D artefact in deep rural communities in South Africa

Figure 2 visually integrates:

- the community entry phases of ICT4D implementation in deep rural situations,

- ethical research practice and appropriate and culturally sensitive community engagement,

- the importance of a collaborative needs or situation analysis as part of community entry,

- appropriate alignment with local leadership, and the need to engender ownership and address power relations,

- the need to examine individual situations,

- the importance of trust relationships with cultural interpreters and community visionaries as advisories and equal partners, and the subsequent collaboration in introducing and understanding ICT4D,

- the underlying and possible contradicting values that project stakeholders and participators may bring into the project situation,

- the need for ICT4D stakeholders, both the "developed" and "developing", to be empowered and emancipated from possible misconceptions and ethnocentric thinking and approaches, and

- the need for critical social theory to be the underpinning philosophy of ethical community entry conduct.

This model is only a brief visual overview of community entry and ICT4D implementation guidelines. A limitation of this model is that it only presents *guidelines* for community entry in a situation where there are worldview collisions. It does not explain *reasons* for collisions or value conflicts, and *why* issues, such as how different groups, in this case outsiders and local community members, portray identity and self-respect or view the meaning of emancipation and the improvement of a situation.

In the narratives about my initial mistakes with a gatekeeper and about Stefan's offensive behaviour, I briefly mentioned that we both had particular ways of showing sincerity, readiness, pro-activeness, willingness, and being well-positioned to do a good job. The local people, however, expected something else. I discovered, especially *after* I became a member, that this was a manifestation of worldview collisions. Although I have touched on this issue in two other papers (*references to be added after acceptance*), this aspect of my research contribution has to be explained in more detail with examples or cases (evidence) of how collisions between worldviews and value conflicts manifested in the Happy Valley project, e.g. how it affected ICT training practices, fieldwork practices, and assumptions about the meaning of emancipation and development, including its implications for future ICT4D work in contexts similar to what I encountered.

Community entry alone was not enough for me to fully explain *why* issues of collisions. What I did emerge during community entry, though, was my own need for self-emancipation. This was liberating in the end, because it allowed me to understand and pursue the emancipatory interests of the researched.

A word on self-emancipation

In this study the understanding and questioning of my own assumptions about reality, self-emancipation, empowerment, truth, etc., which is underpinned by prior beliefs and/or value judgements about reality, required careful scrutiny. I am of the view and therefore assume that no group's ideology, worldview or culture is fully conducive to absolute emancipation. All people are essentially unfree and inhabit a world full of contradictions and asymmetries of power and privilege (McLaren, 1998, cited in Gordon et al, 2001). My starting position, therefore, is that my own worldview is limited and may to some degree be limiting to my own freedom, emancipation, and view of reality, and consequently my ability to interpret social phenomena. This is because one can only interpret that which you are able to perceive (Thomas, 1993).

Every community on the other hand has good in it – good that needs to be discovered and preserved by the critical ethnographer. Considering the position that critical social theory allows the researcher to take, I was able to be open to learning from the community of Happy Valley and their values, "riches", and emancipatory aspects of their worldview so as to firstly, be enlightened, by learning from the contrasts between

my own and the community's worldview, and secondly, to adopt it to such an extent that emancipation may be achieved. In other words, by learning from contrasting worldviews (e.g. the values and the resulting ways in which things are done and valued), I was able to initiate an attempt to internalise the best of both worldviews and therefore grow towards a greater, more fulfilled sense of freedom and emancipation, including a maturing understanding of true emancipatory interests both of the researched and the researcher – keeping in mind that none of this will ever be complete and that the process of emancipation will always be on-going even after the research is completed.

During the early process of *doing* ethnography and by taking a position of openness afforded by a critical position of inquiry, I became aware of the contrasts between my own worldview and those of the people of Happy Valley. The result was that I became aware of an alternate value system and view of reality that highlighted areas where I was also deprived to a certain degree. For example, during the enculturation phases of the project I discovered a strong sense of community living, care, and hospitality among the people of Happy Valley, which some of the cultural interpreters described as "Ubuntuness" or a people-orientated value system. My own background and lack of exposure to the riches of community living made me aware of my inability to fully appreciate the well-being and safety of community living (and its underlying values). Hence I present myself as deprived or impoverished in that regard, because of the consequences of cultural entrapment (Thomas, 1993) and the oppressive aspects of my own worldview of which I was initially unaware of. I therefore took the stance that I am in need of empowerment and enlightenment and that there is potentially a level of well-being in the community of Happy Valley that I am unfamiliar with.

Adopting this manner of thinking in critical research may present opportunities to discover the true meaning of emancipation and social transformation, because the meaning of emancipation depends on the values that one accepts (Hammersley, 1992). Also, this manner of thinking allowed me to also acknowledge and experience that financial poverty does not necessarily imply deprivation, progress does not imply development, simplicity does not imply poverty, and material wealth does not necessarily mean well-being. It has implications for understanding the meaning of emancipatory concepts.

Guidelines for critical research practice

Myers and Klein (2011) offer us a set of principles for critical research. However, in response to Čečez-Kecmanović (2005) who holds that "t[T]he validity test for a critical IS theory is … in IS practice" (p. 37), McGrath (2005) who argues that the theory and practice of doing critical research often do not adequately inform each other and that critical work in IS is mostly conceptual in nature, and Stahl et al (2011) who suggest that there is a lack of empirical research in the critical tradition, I also propose three practical guidelines for doing critical research. Critical reflexivity as the methodology

of critical research (Bourdieu, 1977; Stahl et al, 2011; *reference to be added after acceptance*) is central to all of these guidelines.

Firstly, critical research is associated with has a strong ethical intention (Hammersley, 1992; Stahl, 2008; *reference to be added after acceptance)*, since it is "characterized by an intention to change the status quo, overcome injustice and alienation, and promote emancipation" (Stahl, 2008: 139). Ethicality in ICT4D work is established by the underpinning values and principles of a critical position of enquiry, while critical self-reflexivity is a transformational skill and the starting point for emancipatory and ethical research practice. In this paper I also argue that ethical research should commence with the self-emancipation of the researcher. I.e. the self-emancipation of the researcher is a precursor for the emancipation of the researched and therefore, the beginnings of ethical research and practice. I therefore argue for it to be ethical to first address and expose the researcher's own false consciousness, cultural entrapment, and ethnocentrism *before* attempting to seek the emancipation of the researched.

Secondly, critical research should encourage reflexive accounts in both the researcher and research subjects.

> "Research in the critical tradition is characterised by reflexivity, involving forms of self-conscious criticism as part of a strategy to conduct critical empirical research. Researchers explore their own ontological and epistemological assumptions and preferences that inform their research and influence their engagement with a study. By intentionally expressing, questioning, and reflecting upon their subjective experiences, beliefs, and values, critical researchers expose their ideological and political agendas." (Čečez-Kecmanović, 2001: 147).

As a practical way of nurturing critical reflexivity – the forerunner of self-emancipation – critical research should contribute by offering concepts or reflexivity initiators that the dominated and entrapped (both researcher and researched) can use:

- to resist and articulate domination, oppression, false consciousness, and false ideologies,

- to articulate their own emancipatory interests in such a way that it can help them (and others) reflect on their own entrapment, false consciousness, beliefs, and ideologies, and

- to articulate their worldview and values in a way that is understandable to others. This in particular is useful and a need in cross-cultural research situations (Walsham & Sahay, 2006) where misunderstanding and misinterpretations may occur as a result of contradictory value judgements.

Thirdly, I showed that the key data moments that the critical researcher seeks to understand are conflicts, contradictions, and collisions in the social phenomena (Bourdieu, 1977; Thomas, 1993). However, an adequate understanding of social phenomena only comes from embedded practice in or experiential knowledge of such

data moments. Confirming this notion, Bourdieu (1977, 1990, 1998) argues that an adequate understanding of practice lies in gaining access to intuitive understanding of practice, the spirit of practice, or a sense of the game, rather than relying on the official account that may be imposed onto the researcher by informants. There are real limits to what the informant can explain about his/her worldview. I argue, therefore, that through critical reflexivity and allowing oneself to be carried away by fieldwork collisions is fundamental for ensuring research rigour in critical work and adequate understanding of the social situation (Bourdieu, 1977).

Acknowledgements

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