

## 5.3 Teacher/researcher

### An unsustainable identity

*Sarah O'Flynn*

#### Preface

'What is this Sarah? Cos if it's a moan, I haven't got the time.'

Hester, Friday 8 February 2002

The quotation above is from a participant in my research who is also one of my year-11 GCSE students. As her teacher I did indeed want 'a moan' at her for jeopardising her entire academic success by continuing to bring alcohol to school or to arrive on the premises too drunk to do anything much at all. As a researcher I wanted to observe and ask questions. As both a researcher and a teacher I wanted to understand how to support Hester and others in achieving greater academic success and future happiness, however they envisaged that for themselves. However, before I discuss the genesis of my research in more detail and while I am on the subject, I will start with 'a moan'.

My moan is about the separation brought about by this government of teaching and independent academic research. Apart from recently gaining my PhD (O'Flynn, 2007), I also work full-time as the deputy head teacher in a London authority's Pupil Referral Unit for students excluded from mainstream secondary school. I worked here throughout most of the time I was writing up my PhD, though the research participants were drawn from a mainstream secondary girls' comprehensive school. If I had had the vocational sense I was born with I would not have embarked on a PhD at all – there's not much money in it. I would have taken myself off to the National College of School Leadership and studied for an NPQH – the National Professional Qualification for Headteachers – without which I am now unable to even apply for the post of head teacher, PhD or no PhD. If I had done my NPQH rather than a PhD, I could be bringing home an infinitely larger salary by now and enjoying a more secure quality of life financially. Indeed having a PhD seems currently to be disbaring me from being sponsored by my authority to undertake an NPQH, perhaps because they consider that I might move to higher education and am not really invested in a career in secondary education or that I am now the wrong sort of person for headship anyway. Perhaps I am. The NPQH is a moulding process as much as it is a qualification, preparing one to lead a school within the government's school standards and improvement agendas. My PhD, by contrast, critiques school improvement by demonstrating the damage it does to individual young women in secondary education.

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sional teacher qualifications, teacher reflexivity about student learning is brought within the terms of school improvement as if there were nothing outside that, and critiques like mine risk being considered marginal or irrelevant in the site of the school. It is important to understand my moan because it impacts upon the relationship between theory, the empirical work of my research and my continued work as a practitioner. Most of all it constrains the audiences the research can have at the level of practice and sets my identity as researcher in opposition to my identity as teacher, a point to which I will return at the end of this chapter.

## Introduction

The autobiography of the question is a concept developed by Jane Miller (1995). It has methodological implications, because, unlike positivist research, it presupposes that who I am and how I got to ask the research questions – that is, my ontological position – is integral to the ‘answers’ I find and indeed how I set up the research to do this. In this section I briefly trace the autobiography of the question in terms of my struggle to find theoretical explanations for what I was observing in schools, which eventually led to my research questions. I will focus on three key examples here which provide insights into this process: first, the treatment in school of the pregnant teenager; second, the treatment of a young gay man; and finally the treatment of a young disabled woman.

I have always been interested in the relationship between sexuality and knowledge as it is constructed in schools and as both are embodied by learners. The government itself is interested and bemused by this relationship in some instances (though not all) where it seems to hamper educational standards. Their preoccupation with the pregnant teenager is one such example. The Social Exclusion Unit’s report on teenage pregnancy seemed vaguely bemused and unable to explain why pregnant schoolgirls found themselves removed from school simply for being pregnant:

### Continuing education

8.22 Attention to ensuring a pregnant teenager continues to receive education is often very weak, and the Unit heard innumerable examples of pregnant girls pushed out of school on grounds of pregnancy or ‘health and safety’ ... for many teenagers this is the beginning of permanent detachment from education.

(SEU June 1999, p. 60)

Like the government’s Social Exclusion Unit I was also fascinated by the ways in which the more overt presence of sexuality was often connected to poor academic achievement in school, and, conversely, why those who closeted any indication of sexuality often seemed to do much better. I wanted to move beyond common-sense explanations for this, views which are underpinned by stereotypical notions of adolescence as a time of raging, out of control hormones, to use theory to extend understanding of the complex ways in which young women’s identities are positioned in relation to sexuality and knowledge. One of the first moments that made me realise just how interconnected sexuality was to knowledge in schools involved the example of a young gay man.

I started my teaching career in a large mixed suburban comprehensive school in Outer London. I became the deputy head of ‘Special Educational Needs’ as it was designated at the time. One day I received a referral for a year-8 pupil, Michael, who was extremely camp. He had previously come to my attention when he had asked for support to deal with

homophobic bullying by other pupils. He subsequently came out as gay in year 10 (aged 14). The referral was from his maths teacher, who identified his difficulties with maths as a result of his 'femininity' (her words). I wondered whether femininity could be strictly said to be a learning need, especially as female students in the maths class were not being referred. Historically women have indeed suffered discrimination in education because their femininity was deemed to make academic study inappropriate but in 1989 it seemed anachronistic.<sup>1</sup> His maths teacher, a woman herself and therefore one would suppose less likely to see femininity as a stumbling block to mathematical success, made Michael's life a misery and in the end was disciplined over her behaviour, which was also clearly homophobic. Section 28<sup>2</sup> was in full force and this was a perfect example of the kind of homophobic behaviour that it seemed to tacitly license.

What was interesting to me was that 'femininity' performed in a masculine body could be read as a learning disability in relation to maths. It suggested that the construction of knowledge in curriculum subjects and the dominant pedagogies attached to curriculum subjects had embedded within them a requirement to learn in a particular sexualised and/or gendered way. The performance of 'good at maths', as constructed in this school's mathematics in 1989, simply wasn't available to a young gay man, because 'good at maths' also embodied a particular form of masculinity, which was definitely not camp. Heather Mendick (2006) has argued powerfully that the pedagogy of maths is indeed masculinised. Mendick's work reveals how young people use maths to make their identities both as clever and as masculine and how young men and young women are differently positioned in relation to their study of maths. The hard knowledge of maths is associated with archetypal 'masculine' qualities of rationality, abstract thinking, objectivity and neutrality, whereas femininity is other to maths, in that it is relational, emotional, subjective and connected. In a sense, then, the teacher who said that this young man's problem in maths was that he was too 'feminine' was bizarrely correct, though it would have been more correct to have said, as Mendick has, that the problem is to do with mathematics, rather than those who are learning it.

As much as Michael's issues with maths were about gender, his failure at maths was also due to the teacher's homophobia, and the teacher's homophobia was a reaction to his homosexual performance. The actual performative aspect of his performance itself was important. If he could have just tried to act straight in maths, he might have had success as a learner. It was as if it was impossible to expect rationality from a gay male subject, a stereotype that is still pervasive in Western gay culture. I found a partial understanding of the issues involved here in terms of the Cartesian dualistic logic embedded in Western societies which constructs the binaries Mendick explores in her work. While femininity might make maths difficult, it did not threaten it in the same way as it did when embodied by a gay man. I would suggest the problem was not that Michael was too feminine, as the maths teacher suggested, but that he was mocking masculinity, which as a man was his for the taking. Instead he was treating it with disrespect.

The Cartesian dualistic logic of mind/body and rational/irrational splitting has particular relevance to the site of the school. Schools are places which are designed to produce rationality and cognitive development. Schooling is a deeply modernist project. In this context, it is unsurprising that the body is required not to draw attention to itself. The individual body becomes part of the corporate body of the school, clad in its uniform. The performance of sexuality is 'other' to the performance of learning and cognition and therefore, in simplistic terms, those who are perceived as sexual in any way are likely to be less successful than those who suppress or closet sexuality. Logically, schools educate for a delayed practice of sexuality partly because it is perceived as a practice of the body and is therefore not compatible with

the development of reason. The ideal position for the secondary school pupil, logically, is to be quiet about sexuality and if possible to remain heterosexually asexual. Any active practice of sex for young people is therefore potentially undermining of academic achievement. On the other hand, Michael was not voted out of his maths class because he was having gay sex. It was because of his tendency to act gay and not to be able to closet it sufficiently, so that he was labelled as gay by others. Halley (1993, p. 85) has argued that heterosexuality is a 'default category', incorporating even homosexuality, provided that it remains covert. In short, the class of heterosexuals is 'home to those who have not fallen out of it'. As Judith Butler has remarked, "intelligible" genders are those which in some sense institute and maintain relations of coherence and continuity among sex, gender, sexual practice, and desire' (Butler 1990, p. 23) and, we might also add, knowledge. In this instance, incoherence not only made gender unintelligible but also produced the subject as unintelligent.

Michael's case and the plight of pregnant teenagers convinced me that there was more to educational success than met the eye, that sexuality of any sort led a precarious existence in schools and that any trace of non-normative sexuality could close down the possibility of being successful in certain curriculum subjects altogether. As a teacher this was a real concern for me. It suggested that the control of adolescent sexuality was just as important in the production of educational success as any sort of cognitive development I might try to support in a classroom and that the discourse through which cognitive success materialised was intricately bound to sexuality. It suggested, too, that the control of adolescent sexuality was achieved through access to educational success. Rationing occurred when sexuality became out of control or stepped out of line. Ostensibly, schools use sex education to present an official view of sexuality to young people, that it would be in their best interests to delay sexual activity. It is presented as 'advice' (DfEE, 2000). However, a far more significant and potent way of ensuring young people's compliance with this advice is by rationing education,<sup>3</sup> controlling access to educational success for those who are overtly sexual, limiting access to subject choice or level or even to full-time education.

Perhaps the most important formative experience for this thesis occurred while I was working in a comprehensive, grant-maintained, over-subscribed girls' school in an Outer London borough. Helen, a young woman with cerebral palsy, was admitted into year 9 at the school at the end of the autumn term of 1998. Prior to this, she had been in a mixed school and prior to that, in a special school. The reason given for her wishing to leave the mixed school and attend this school was that she had been badly bullied by the boys at the mixed school. She only managed to remain in the school for one term and by the beginning of March she had been permanently excluded on the grounds that the school could not meet her educational needs. However, the real reason Helen could not remain in the school was that she had apparently been caught masturbating in the toilet. In many ways Helen was an example of what Shereen Benjamin suggested is 'the really disabled discourse of success' (2002a, chapter 8). As Benjamin argues, these pupils are those whose diversity cannot be valued because it is 'too diverse' (2002b, p. 132). What made Helen really different and really disabled, however, was her overt sexuality but this has to be interpreted in the context of her dis/ability, because they were productive of each other. The disability embodies the subject or rather engulfs it and there is a tendency to perceive those whose bodies are disabled as completely at the mercy of their bodies. Perceptions of disabled sexuality take to extremes the conflicting discourses of sexuality already found in schools about children's sexuality, either as unruly sexual adolescents with hormones raging out of control or as protected in a walled garden of childhood sexual innocence/ignorance. Helen's masturbation keyed into the first of these stereotypical assumptions about disabled sexuality and

meant that she operated in opposition to the discourse of childhood sexual innocence. The key events in Helen's progression towards exclusion often centred on her body. Her masturbation led her to be viewed as governed completely by her body and without a mind. This served to produce Helen as ineducable.

Attitudes to masturbation underwent a considerable reworking in the latter half of the twentieth century, especially in relation to adolescents, but even in 1994 the then US president, Bill Clinton, dismissed the surgeon general, Jocelyn Elders, for suggesting that masturbation be included as a topic within sex education in public schools (*Lancet*, 1994; Irvine 2002). Helen's behaviour was seen as corrupting of others, and she had to be forcibly and permanently expelled. The most upsetting process in what happened to Helen was the production of her as incapable of reason, through her totalising embodiment. I could not understand for a long time why it was that although I kept producing evidence as her English teacher of her attainment and progress, this had no impact at all on the final judgment that the school could not meet her learning needs, a view which I did not share.

### The research project

My research was born out of a desire to trace processes of inequity which were related to the presence of sexuality in adolescent pupils and which worked by constituting the presence of sexuality as also an absence of knowledge or sense. It also explains the use of post-structuralist theory subsequently in my research. The examples I use all suggest a self in process and a self constituted through key discourses about knowledge and sexuality and enshrined in dominant school effectiveness/improvement agendas. In some senses the examples that led to the research project all make 'strange' the processes at work in the schools and question the taken-for-granted assumptions through which those processes work to label pupils as difficult or impossible to educate. This is the starting point for the ethnographer, and it is no accident therefore that my research evolved as an ethnographic project (Youdell, 2006, p. 66).

It also explains why I chose not to undertake more conventional teacher-research using the model of action research. Cohen and Manion (1994, p. 186) define action research as follows:

Action research is situational – it is concerned with diagnosing a problem in a specific context and attempting to solve it in that context: it is usually (though not inevitably) collaborative – teams of researchers and practitioners work together on a project; it is participatory – team members themselves take part directly or indirectly in implementing the research; and it is self-evaluative – modifications are continuously evaluated within the ongoing situation, the ultimate objective being to improve practice in some way or other.

The problem for me in using this method was that it could not offer a critique of the context itself. Rather it worked by attempting to improve or solve a problem 'in that context', where the context was not subjected to critical analysis. Ultimately this meant that the burden of change was left to those in the context with the support and insights of research. Pupils and teachers as the principal players in this context in my view are already impossibly burdened with the task of making school improvement or school effectiveness work. Moreover, because it appeared to me that the context of school effectiveness/improvement firstly had embedded within it assumptions about knowledge and about sexuality as the 'other' to knowledge and secondly that it also functioned as a discourse through which it constituted



successful learner and non-learner identities, holding on to the possibility of envisaging a change in the context was vital. Although my research did not have the circuit of production of action research, it involved the generation of grounded concepts which led to new understandings of how young women embodied or resisted embodying sexuality in school and suggested how this might have a significant impact on their academic achievements. The research questions I asked were as follows:

- How do young people, and young women in particular, use sexuality and sexual practice in the construction of their identities as successful or failed learners?
- What are the dominant discourses of sexuality in school, how are these linked to education and how do these constrain the agency of young people in producing themselves as successful?
- Why is it that overtly (uncloseted) sexual or promiscuous behaviour in young women should so often lead to academic failure?
- What sexuality may be tolerated in young women, as compatible with academic success?

I worked with a relatively small group of about 25 year-11 pupils at a comprehensive girls' school over the course of one or two years. Of this group I worked very closely with 11 pupils, 8 of whom were from minority ethnic groups. In terms of their academic attainment eight of these pupils were poor achievers in school and five had been or were at risk of exclusion from school. Three further pupils were high achievers, though two had also had experiences of exclusion from school. One was what one might term 'a model student'.

### **Working with 'sexuality'**

Although it is impossible to summarise my research in the scope of this chapter, what I hope to do here is explore some of the findings of the research, give insights into how young women manage their sexual selves and their academic selves in school and explore some of the costs of this self management to the self. I should perhaps say a word about 'sexuality'. The difficulty of terminology around sexuality is one that I have struggled with throughout this research. I use the word 'sexuality' always in the widest sense possible. When I am writing about sexuality I do not just mean sexual orientation, or different sexual practice, or sexual feelings or desires, or 'having sex' with others or with oneself. I also include in the definition asexuality, not having sex and sexual abstinence. I use it as a term to define broadly the ways in which individuals manage the sphere of human experience which we term 'sex'.

Much of the preparatory work of the research involved tangling with theory on identity construction (Hall, 1992), psychoanalytic accounts of sexuality (Britzman, 1998), Foucauldian work on sexuality (Foucault, 1976), the work of feminists on sexuality (Fine, 1988; Holland *et al.*, 1990; Walkerdine, 1990; Lees, 1993; Hey, 1997; Holland *et al.*, 1998), sexual theorists (Rubin, 1984; Weeks, 1985; Sedgwick, 1990; Seidman, 1993; Halberstam, 1998; Butler, 2004), and those working in the area of sexuality and schooling (Walkerdine, 1990; Mac an Ghaill, 1994; Harbeck, 1995; Unks, 1995; Hey, 1997; Valentine, 1997; Epstein and Johnson, 1998; Gordon *et al.*, 2000; Walkerdine *et al.*, 2001; Micelli, 2002) as well as sociologists on sexuality and the body (Prosser, 1998). Although the list of sources here is not comprehensive, the work of these thinkers helped me to create my own theoretical tool kit<sup>4</sup> to help me support and develop my interpretative frame. However, one

important psychoanalytic account of learning by Deborah Britzman made a particular point, which I felt spoke to the aims of the research:

Educators have yet to take seriously the centrality of sexuality in the making of a life and the having of ideas ... educators continue to ignore the stakes of the demand to renounce instinctual pleasures, specifically as this prohibition may then also work against the capacity to risk love and work.

(Britzman 1998, p. 70)

Though my research was not psychoanalytic as such, I did believe that sexuality was never taken seriously in debates around academic achievement, and that this was in stark opposition to small but established bodies of research on issues of educational success and gender, disability, class and ethnicity.

## Key findings of the research

### *Managing sexuality*

One of the most important findings of the research was the sheer hard work of identity management that young women did in relation to their sexualities in the process of making their identities as learners. In a large part sexual self-regulation was done to please us, the adults, people in authority in schools and at home, to meet our expectations. Childhood innocence was experienced as a pervasive discourse by young women, not only as a shaping influence for their sexuality but also for their cleverness. One of the high-achieving pupils, Darcy, was exemplary of this. She was entirely co-opted into the process of sexuality as irrelevant to her now, and yet in all sorts of ways she was involved in the suppression of sexuality, often by isolating herself from others and by retaining a childlike lack of knowledge about the world around her:

So – I spose at the moment cos everybody's doing stuff – everybody's got social lives and stuff and you feel like really weird that you're like at this age and your only concern is studying whereas like everyone else is enjoying their lives – sometimes you do feel like 'oh am I doing the right thing?'

(interview, July 2002)

Darcy's suppression of sexuality was only achieved by distancing herself socially from her peers and indeed from her Sikh culture and her family, as well as from any wider knowledge of what was going on in the world. She described herself as an 'alien'. She had a developing eating disorder which concerned her and her family. She had entirely absorbed neo-liberal messages about self-reliance and the need to succeed, but this was at the cost of her emotional, social, sexual and physical well-being.

Other students, less high-achieving, were often just as aware in their understandings of the links between asexual practice and enhanced academic achievement. Two Somali students, Nadjma and Nazrin, for example, clearly understood that heterosexual relationships needed to be presented as superficial:



- Nazrin:* I think I want to finish my education before doing things like that [having a boyfriend, having sex]. I told my mind not to go with boys and not to do that thing until I finish my education. I mean you can have a boyfriend.
- Nadjma:* Yeah yeah ...
- Nazrin:* But not like do the silly things ... [the rest is obscured by Nadjma's interruption].
- Nadjma:* No, no – you're saying it like that – but if I say I don't wanna have a boyfriend but sometimes it happen to you – cos you don't – you don't wanna have a boyfriend but who knows?
- Sarah:* You meet someone?
- Nadjma:* Yeah. You meet someone but if you be careful in yourself ...
- Nazrin:* Yeah – like more hard.
- Nadjma:* Hard.
- Nazrin:* Like hard on the inside.
- Nadjma:* So that means nothing happen to you. You can have a boyfriend and it's not a problem.

(interview, March 2001)

These students' understanding of heterosexual sexual relationships is carefully modulated to ensure that their effect is minimised. Learning is hard and they need to be 'hard' to undertake it successfully. They work at promoting a carefully balanced identity in which they can achieve success both as heterosexual women and as learners.

Surprisingly, I found that high-achieving students did not always have histories of high achievement and they had learned various techniques subsequently to manage sexuality successfully after experiencing school failure. Mataia, for example, explained how following her permanent exclusion from another school for homophobic bullying of a teacher and a rebellious attitude to learning, she had set about recreating herself as an intellectual. Part of this involved taking up more fundamentalist Islamic attitudes and wearing a jilbab. She spoke at length about Islam, presented a sustained and cogent critique of Western globalisation but also intellectualised sexuality and demonstrated a wide cultural knowledge about sexual practice. Mataia also invested considerable time and effort in contrasting a past life for herself in which she had a more overt sexuality and her new identity as a Muslim woman, in which she did not. In this way she was able to present herself as at once sexually knowledgeable rather than naïve, but also as a sexually innocent good Muslim woman, with regard to sexual practice. This was a successful strategy for managing both sexual and learner identities in school and helped her to achieve highly academically.

What became clear from the research, I think, was that education operated disingenuously in relation to young people and their sexualities, because sexuality was not something that young people could choose to manage or not. By acting as if it was by, for example, suggesting it could just be advantageously 'delayed' (DfEE, 2000), a burden was placed on young people to manage their sexual selves in ways that we approve of but without our support, and if they failed, then we ensured that the education system punished them. With alarming regularity anyone who was overtly sexual or who 'did girl' inappropriately and in unfeminine ways, or who did not do heterosexual girl, found themselves excluded from school or displaced from school or confined to certain spaces in the school; effectively marginalised.

*Excluding sex from the school*

Four students I worked intensively with were all excluded at various times from a school and in each case their exclusion centred on sexuality or their performance of gender. For example, although Ann had never been in trouble in school previously and was a high achiever, her lesbian desire for a teacher in year 11 simply could not be managed by the school. She had to leave. Her desire was distressing for the teacher, and because there were no strategies in place to manage such an event, Ann could not remain in school. She attempted suicide and received psychiatric support but her lesbian desire was always in danger of being constituted as a psychiatric illness. When Ann spoke to me about what had happened, there were clearly psychoanalytic processes occurring both in relation to her early childhood attachments and the similarities she saw between those attachments and the teacher object of her crush. It was also a means by which she could displace or park her sexuality onto someone who was academically successful. It was an attempt by Ann to manage her sexuality in school and also revealed teaching itself as a potentially seductive process.

One of the problems for teachers, however, is that they are often unsure how to talk about sexuality or gender nonconformity in school in relation to pupils or their own practice. This was clear for the teacher who was the recipient of Ann's desire, but also emerged as an issue for other staff. Better teacher education around sexuality, and in particular around the psychoanalytic processes involved in learning and teaching, would enable strategies to be evolved with greater confidence, which might increase young women's well-being and their educational success at school. At the moment teacher education programmes pay very little attention to sexuality within education. The Teacher Development Agency website details 48 key professional standards which a teacher must meet in order to gain qualified teacher status (QTS). Nowhere is the word 'sexuality', or 'sex', mentioned, even once.<sup>5</sup> This, in turn, makes it very unlikely that trainee teachers will ever have lectures or seminars on the importance of sexuality to learning or to teaching. It is unlikely that, even minimally, young people's sexuality will be acknowledged.

For those not excluded as such, I found that exclusion was avoided through internment or displacement, as in Carol's case. Carol had been excluded from her previous school for 'doing boy' through fighting and violence. Carol regularly 'passed' outside school as male. Indeed she preferred this. Carol confessed to me that she thought she was a boy really, that her father spoke to her as if she were a boy and over the course of the year she worked very hard to make her appearance even more masculine than it already was by wearing classic schoolboy uniform and by shaving off her hair. She also constructed her learner identity as masculine, preferring maths to English, practical subjects to those that were theory, or content-led and excelling in PE. Carol's school file from her previous school indicated such a difficult history in education that when she first arrived the head teacher decided that she should attend no lessons at all but spend all week in alternative education, of which I was in charge. She was placed on work experience two days per week in a car mechanic's workshop and studied for all her subjects in the alternative education unit initially, though she eventually became able to attend maths, PE and art classes in the main school. It was what I called 'benevolent internment'. It did allow her some success and it protected her from a trans-phobic and homophobic school population but it also protected them from her. Carol's case raised wider issues potentially. Her presence caused anxiety amongst other students, who seemed worried about the fact that she might 'fancy' them but also perhaps that they might fancy her. It also called into question statistics about the differences between girls' and boys' achievement. When girls start being boys one is forced to ask how to include

them in statistics about gendered learning. Whilst researchers have observed that 'sissy' boys – those boys whose studiousness aligns them with forms of femininity – experience considerable homophobia in school (see, for example, Epstein and Johnson, 1998) the treatment of pupils who practise female masculinity is also punitive or ostracising, making it difficult for them to participate in school successfully. By focusing on girls who 'do girl' very differently or present sexualities that are not normative, or who don't do girl at all, we would be able to give a fuller account of the range of subject positions taken up by young women in school. By making these visible we could also provide a more detailed account of the ways in which gender and sexuality make a difference to educational success.

*Being a teacher/researcher: exposing contradictions*

'I didn't even know you *could* study that.'

(Hester, fieldnotes September 2001, on the occasion of my explaining to her that my PhD was about young women's sexualities)

I found that pupils often led closeted sexual lives or imagined sexual futures that were not in line with government education policies to raise standards and career expectations, policies which consequently misaddressed them. Being a teacher/researcher here was a perfect position from which to experience the contradictions of government policy. As a teacher I had to implement such policy but as a researcher I uncovered reasons why it could not work.

Mercedes, for example, as a young Traveller woman, was the object of considerable attention in government policy around inclusion. However, while policy tried to raise Mercedes's expectations of success and her career expectations, she was busily planning her own future, making herself more central in the Traveller community through marriage to a Traveller and a child by the time she was 18. Whilst initiatives such as the government's Aim Higher programme tried to lift Mercedes out of the material poverty of her community through education, Mercedes was vowing to me that she would never leave that community and would never have a professional career because 'snobby' people would not understand her. Her main priority was that such professionals kept out of her 'business' because they were 'too nosy' and that if she had any power the first thing she would do was reduce the numbers of police, teachers and social workers.

Bringing sexuality openly into the school as research and hence a legitimate subject for sustained inquiry and discussion and my openly declared identity as a lesbian fractured boundaries about what was knowledge and what was not, the status of pupil experience and whether it could count as knowledge. Could their ontologies be used to make new knowledge? Interestingly, after her initial disbelief that sexuality could be a topic for research, Hester came back into my office two days later to ask me if you could study 'women' at university, because if so she wanted to do a course which was just about women's literature, history, science and medicine and so on 'but only women's'. She had clearly been thinking about what might count as knowledge in other academic but non-school settings. She was delighted when I told her about women's studies courses. There were instances throughout the research such as this, when an engagement with sexuality led to a re-envisioning of whether one could, after all, make a successful learner identity.

However, although Hester wanted to do this and eventually to become an MP, her academic achievements meant that she was considered a more appropriate candidate for a vocational path into the caring profession. A career for her in the caring profession was practically assured and yet she 'chose' to throw it away. In order to convince everyone that

it wasn't after all right for her, she set about remaking her sexuality, so that it was the very antithesis of caring femininity. As much as I tried, as her teacher, to support Hester to gain GCSEs, to encourage her to think about how to be an MP, there was always this big plan for Hester waiting in the background: the training scheme, the vocational work-placement waiting to take her on, because she would make a good carer. Hester was already a good carer. She used her sexuality as much to unmake a carer identity, as she did for her own pleasure. Indeed, her own pleasure was not really ever achieved and there were considerable costs to her sanity.

If we look at it in this way, then we might argue that in Hester's case at least, the stereotype of the adolescent at the mercy of libidinous energy and hormone imbalances was produced by and through her education. It was her education which conjured it into existence. Her sexuality was socially and institutionally produced as well as being a psychological production by Hester. It was not her body and the out of control hormones running round it that caused her to behave in this way, it was a psychological resistance to what schooling offered her which mobilised sexuality as resistance.

## Conclusion

The title of my PhD was 'Testing Times: The Construction of Girls' Desires through Secondary Education'. I wanted to draw attention to the fact that adolescence is perceived to be a testing time for young people and also to allude to the target and auditing culture of New Labour neo-liberal education policy, in which young people are constantly engaged in an endless round of assessment and target setting. I also wanted to suggest that it is partly through the process of schooling itself or in opposition to it that girls construct their desires in terms of their imagined futures and that learner and sexual identities are always in 'construction'. One of the most disenchanting aspects of the research was the regularity with which government education policy seemed to fail these young women either by creating educational success but at the cost of individual health, or by misaddressing them but more fundamentally by failing to acknowledge young people as subjects with sexuality and sexuality itself as important for education. I still believe that we are failing to recognise the implications of this for schooling and that we continue therefore to produce failure by attempting vainly to expel sexuality from the site of the school. But now I risk ending up back at my moan where there seems no way for my researcher identity to influence policy at the level of classroom practice.

## Notes

- 1 Further reading would suggest that femininity does indeed make success more difficult. See, for example, Benjamin, 2002; Leathwood, 1998; Walkerdine, 1988.
- 2 Section 28 was the infamous amendment to the Local Government Act of 1986, brought into force in 1988, which forbade Local Authorities from 'promoting homosexuality' or promoting 'the teaching in any *maintained school* of the acceptability of homosexuality as a pretended family relationship'. It was finally repealed in November 2003.
- 3 For further discussion of the concept of 'Rationing Education' see Gillborn and Youdell, 2000.
- 4 For a 'tool kit' for academic writing see Boden *et al.*, 2005.
- 5 See Teacher Development Agency website, accessed 30 December 2006: [www.tda.gov.uk/teachers/professionalstandards/currentprofessionalstandards/qtsstandards.aspx](http://www.tda.gov.uk/teachers/professionalstandards/currentprofessionalstandards/qtsstandards.aspx).



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## 5.4 Using theory in social research

### Reflections on a doctoral study

*Maria Balarin*

The word *theory* is central to the process of doing research. It is, however, often understood in very different ways that range from the idea of theory as something more or less rigid to more dynamic understandings of theory and theorising that highlight the importance of developing new explanations through research. Grappling with the idea of using and developing theory when pursuing a project of one's own can often be daunting, as one faces questions about the originality and relevance of one's explanations. But the role of theory is crucial from the first moments of defining a research problem and the set of related questions, as well as in gathering relevant data and in developing explanations for the problem under investigation.

Understanding the role of theory in social research has to do with some very fundamental questions in relation to how we understand the process of doing research itself, and which we can start to deal with by asking 'when does theory come into the research process?' Is it at the beginning, at the end, or is it present all the way through the research? Responding to such questions, rather than a practical matter, requires dealing with some of the most delicate conceptual issues surrounding the process of doing research. It involves defining whether we understand research as a process of formulating a set of more or less definite hypotheses which we then try to 'test' through empirical data; or as a more inductive process by which we collect data and then try to elaborate a theory on what the data 'tell us'; or, indeed, whether it has components of both.

Addressing such questions can lead us to focus on discussions about the way in which we understand the world, whether it is an entity with more or less fixed properties that we can investigate (rather neutrally), or, whether, while the world is independent from us, we always come to know it in a way that is mediated by our interpretations. For empiricists, for instance, who believe that research is a way of tapping into the 'world out there' and reporting on what we find, the role of theory is much less important than for those of us who believe that we actually come to know the world through theory, and that developing better knowledge is equivalent to developing better theoretical explanations for the problems we encounter. This discussion involves complex issues about the extent to which we can have access to the world out there, or whether we live in a world of mere interpretations. Each of these positions has particular assumptions and implications. In the first case, the assumption is that our knowledge corresponds to the world, it mirrors it; in the latter, if one is not careful, there is an open door towards relativism, a position in which any kind of knowledge seems equally plausible (Pryke *et al.*, 2003).

Defining one's position in relation to such problems requires a careful articulation of ideas that is beyond the limits of the present chapter. Some things, however, must be said, and will hopefully become clearer in the course of the coming pages. The empiricist position that

claims the possibility of developing knowledge actually *corresponds* to 'the world out there' has been thoroughly criticised from various strands of philosophy, which, more recently aided by developments in the biology of cognition, support the idea that our knowledge of the world is always mediated by our perspectives and by the particular interpretive frameworks through which we organise our perceptions. This, however, does not mean that our knowledge does not open to the world at all. It does (Clark, 2003). The problem is that while we can go on trying to know and understand the world, our representations and our knowledge of it have certain insurmountable limitations. They will always be incomplete and fallible.

This implies that criteria for judging between theories cannot rely on the correspondence between our theories and the world, which cannot be determined in a definitive way, but rather on the robustness of our theories to actually explain social or natural phenomena, and on other criteria such as the degree of coherence of our explanations, their capacity to explain what other theories don't while at the same time explaining what they do, their plausibility, etc. (Sayer, 1992; Steinke, 2004). It is important to bear in mind that while we might not be able to know the world precisely and absolutely, the world does have a certain structure and certain characteristics which are more or less stable and definitely independent of our thought processes. This sets limits to the explanations we can come up with, as the world will simply not allow any kind of interpretation (Sayer, 1992).

From this standpoint, theory is not something that comes in at specific moments of the research process, nor does it refer to a set of fixed ideas that we test against the world. Rather, theory comes in at the very beginning, from the moment when we start asking questions and formulating a particular problem that we want to focus on. By theoretically engaging with such questions the borders of our research problems start to become crisper, we begin to ask more precise questions and it is thus that we can actually begin to define the more technical matters of how to go about gathering relevant data. In the latter, theory is also fundamental, as we begin to develop explanations from the first moments we set foot on the field, and when we make decisions about new information we want to gather to help us refine our questions. Thus, while theory and theorising are maybe more clearly present when we are interpreting data and attempting to arrive at more coherent explanations about our research problems, the role of theory is continuous.

What follows will attempt to illustrate these ideas with the use of an example from a research study carried out as part of a doctoral degree, which focused on the radical nature of policy discontinuity in Peru.

### **Using theory in a study of radical education policy discontinuity in Peru**

The problems that concerned me when I embarked on this piece of research had to do with the ways in which educational reforms in Peru are usually handled (Balarin 2006). I became interested in this during the time in which I worked in the Ministry of Education of Peru, at a moment in which a very comprehensive reform was being planned and set in motion with the financial help of international organisations such as the World Bank and the InterAmerican Development Bank. A couple of years into the beginning of this reform process, the policies that it involved began to change, responding not to technical considerations, nor to specific demands or new information about the specific problems being addressed, but, rather, to what appeared as very particular political decisions in relation to the existing government's attempts to perpetuate itself in power. The latter increasingly

came to replace the reform aims. And while that government was to collapse as a result of the deep corruption that it gave rise to, the more democratic and transparent government that followed continued with this style of policy making, led by the particular views of some individuals in power. The problem that aggravated this, and which gave rise to radical degrees of policy discontinuity, was that policy makers (i.e. ministers and heads of ministerial offices) were constantly changed in response to the shifts in the usually delicate balance on which governments depend.

While the complexities of this process of constant policy change were to become clearer once I started researching it, this was where my initial interests focused. At the beginning, though, it was a rather ill-defined problem that simply pointed the direction in which I was to go, but which still lacked definition. I already had some ideas, some initial theories as to the reasons that might lie behind the problem of radical education policy discontinuity. After leaving the Ministry of Education I was involved in several educational research projects, and the issue of radical discontinuity – although not necessarily described in those terms – was a constant reference in people's comments about the failure of reforms. It also became increasingly clear that it was not a recent problem, but that it had marked the history of educational change in the country, and was also a characteristic of other countries in the region. All this gave me some initial hints as to the nature of the problem and where to start thinking about it.

The role of theory was crucial in moving from this rather broad understanding of the problem to a clearer definition of what I wanted to study and the questions I needed to address. I began reading texts about education policy, many of which focus on the forces that are at play in the definition of policies and increasingly refer to the effects of globalisation on educational change. Many of these texts stress the way in which policy agendas are shaped by economic change. I increasingly came to think that the problems I found in Peru had to do with even more fundamental issues. In the more advanced nations in which most of the education policy literature had emerged, there were certain assumptions about the way in which the policy machinery operates, and the interaction between different social, economic and political forces that did not appear to follow the same circuit in a developing country like Peru.

This marked the first area of theoretical exploration that I was to focus on. I had to theorise the differences and particularities that I found in the Peruvian system, in the way in which the state had developed, and which explained the characteristics of the public administration, as well as the often complicated relations between education, society and national development. What marked this moment as well as other stages in which theory became crucial for the research was a kind of friction between the problem I was interested in and the theories currently available to explain the most common features of education policy making. There was a need for explanation that was not covered by current theories and which therefore required elaboration. This was a first step towards achieving a clearer definition of the research problem.

The exploration of this area led me to clarify what were the particularities of the Peruvian state system that I found interesting, and which appeared to be related to the styles of policy making that had emerged in the country and led to the radical levels of discontinuity. I began by focusing on rather broad bodies of theoretical thought, such as conflict and consensus theories of the state, which, in different ways, provided descriptions and explanations for the particular ways in which states, their administrative apparatuses and their relations with social demands operate (Lauder *et al.*, 2006). Different theoretical approaches focused on particular issues, with some stressing the power relations between different factions in society, others suggesting that political interests are structured in a more open and competitive



way, and yet others emphasising the ways in which the organisational apparatus of the state (the way in which it has developed to administer different areas of social life) has a certain autonomy from specific economic or political interests.

What became clear through these and other readings was that configurations of state power and administrative organisation have to be understood in relation to the ways in which different states have historically developed. This led me to focus on a complementary area of theoretical ideas coming from post-colonial theories of the state. The latter offer relevant explanations for the developmental routes followed by countries once under colonial rule, and which have often maintained some of the deep social cleavages established during colonial times. Here, I found, one could begin to find some of the explanations for both the way in which the institutions of the state have developed, how the interests of different social groups have become politically articulated (or not) and the role played by social policies such as education in national development.

As the research problem began to get into focus I found other more specific areas of theoretical exploration. One of them had to do with understanding policy processes, how they operate and the arrangements that regulate them. Again, it became clear that particular ways of formulating policies have to do with the characteristics of different state formations. My readings, therefore, also had a strong focus on Peru, and more specifically on available historical and sociological discussions of the ways in which the state has developed.

It was by engaging with these more theoretical discussions that I could refine both the research problem and the research questions. This also allowed me to define the way in which I was to go about the data collection. The specific decisions I made in relation to the latter emerged from the research questions, just as these had emerged from the different areas of theoretical discussion that I had embarked upon.

As it appeared, the problem of policy discontinuity was related not to the way in which micro-political forces (such as school-level decisions) impinge on and modify initial reform aims – which is a frequent source of policy change (Ball, 1987) – but rather to the way in which high-level policy makers make decisions about the need for changes in policy directions. The focus of the data collection was thus on a sample of policy makers (ministers, their close advisers, heads of ministerial offices) and other relevant policy actors (members of the Teachers' Union and of the National Council for Education) who were interviewed in depth. While there was an initial identification of subjects, the final sample was completed through a snowballing technique common in policy studies, whereby new individuals were identified through the initial interviews (Goldfinch, 2000).

The specific areas on which the interviews focused were also theoretically driven. While an open-ended and conversational approach to interviewing was used (Holstein and Gubrium, 2004), the initial preparation of the interview schedules included the definition of certain topics that appeared to be important in the light of theoretical discussions. Most of these had to do with the institutional arrangements that frame and regulate policy making, such as the characteristics of the bureaucracy, the formal rules for policy making, the extent to which different sectors coordinate when making decisions, the role of international agencies in the definition of policies, etc.

While this selection of areas was theoretically driven, the interviews were open enough to let new elements come up. In this way, it soon became clear that very rich data offering interesting explanations for the radical levels of discontinuity were emerging from the less structured and more narrative accounts provided by the interviewees (Riessman, 1993). These took the form of personal stories that included reflections on how they reached positions of power, as well as accounts of the decisions they made and the difficulties they encountered.



While some of these overlapped or added to the pre-defined areas of enquiry, they offered important new information with which to understand radical discontinuity. Through their stories the interviewees were presenting themselves in particular forms that served to explain and justify many of their decisions. By noting this, and seeing how it could contribute to the theoretical explanations of the problem, I soon began to give more space in the interviews for the narrative elaboration.

A clearer picture began to emerge from these accounts of the difficulties of steering a sector such as education in an institutional context like that of Peru. Issues such as the lack of a civil service career, the lack of a more or less structured party political system, the absence of a culture of accountability, the extremely intricate regulations that often slow down decision making and hinder policy consolidation, were among the issues that would later help me develop a more complete set of explanations for the problem under study.

Although I had already defined some of the areas for theoretical elaboration while collecting the data and, later, when analysing it, new areas of interest started to appear. The final analysis thus combined a discussion about both the interview themes and the policy narratives, which together provided a view of the institutional context of policy making, and of the particular cultures that emerge within it. The latter were characterised by highly individualistic decisions, which were attributed to the lack of structuring rules to limit and bind policy decisions. Coming up with this was not a straightforward process, but more like a coming and going with ways of presenting the analysis until I was more or less satisfied with the explanations I was providing.

In this process, it became increasingly clear that while institutional elements could help explain radical policy discontinuity, the latter was also deeply related to the kind of developmental path assumed by the Peruvian state, which had historically maintained a deeply divided social structure. Public education, which had emerged as an attempt to extend social provision, had increasingly developed as a service for the poor – particularly in recent years, when private provision of educational services has been on the rise. This meant that solving the problem of radical discontinuity would not only require institutional changes, but also a different approach to development, more focused on extending citizenship and opportunities to all.

The data collection and analysis were thus characterised by an interplay between the emerging findings and the theoretical explorations that I had originally pursued, which I complemented as the research went by. Rather than applying a set of theories to a particular case – or attempting to test them – the theory guided the research, but without constraining it. In the end, the contributions of the study were not only the particular findings, but also, and maybe more importantly, the ways in which such findings were used to refine existing theories. The research process itself, in this respect, can be seen as a sort of permanent conversation between the researcher and the theoretical resources available to her.

The view which I have tried to convey reflects not only my personal experience and understanding of what doing research is about, but fits also with those of other researchers. Layder (1998), for instance, makes it clear that 'theorizing should ... be regarded as a continuous feature of research' (p. 28), where the researcher adapts, transforms and adds to existing theoretical bodies. Taking this into account implies leaving behind more traditional approaches to research, which often have a clear-cut definition of research stages (identifying a problem, mostly in terms of gaps in the literature reviewed; defining a set of questions and methodological strategies for data collection; collecting data; analysing it; and arriving at conclusions). What emerges then is a somewhat more chaotic, though no less rigorous, view of the research process in which the formulation of the problem and the research questions,

as well as the data gathering and analysis, remain open to transformation and refinement as the research develops and as we formulate better theories to explain the problems that concern us. As Layder (1998) suggests, 'there may be no end-point to the formulation of the research problem', but the research itself resembles 'a rather haphazard "evolution" characterized by a series of oscillating phases of relative confusion and clarity rather than an immaculate conception' (p. 30). This view also coincides with Haig's (1995), who suggests that 'because our most important research problems will be decidedly ill-structured, we can say that the basic task of scientific enquiry is to better structure our research problems'.

It is precisely this process that I have tried to illustrate through the account provided above. Going from an ill-structured to a clearer definition of our research problems is a process that strongly relies on the use of theory. The latter is not 'an end-product of the research process' (Layder, 1998), nor is it limited to a 'tightly formulated' set of assumptions, but is a crucial element that helps us define and redefine our research questions and problems in what is more like a to-and-fro process of going from theory to data and vice versa, until we find a set of explanations that address the problem of study and at the same help us define it more clearly. In this sense, the goal of social research can be seen as much in terms of defining new problems as in terms of generating new theories (explanations) for them. Pre-existing theory is crucial in this process, as it marks some of the ways in which we are to go. Our contributions will stem from the particular ways in which we engage with such theories, and from our ability to come up with views and explanations of our own.

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