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DISCOVERY AND RECOVERY

Reading and Conducting Research Responsibly

When any group within a large, complex civilisation significantly dominates other groups for hundreds of years, the ways of the dominant group (its epistemologies, ontologies and axiologies), not only become the dominant ways of that civilisation, but also these ways become so deeply embedded that they typically are seen as "natural" or appropriate norms rather than as historically evolved social constructions.

James J. Scheurich and Michelle D. Young (1997, p. 7)

The range of contemporary critical theories suggests that it is from those who have suffered the sentence of history-subjugation, domination, diaspora, displacement that we learn our most enduring lessons for living and thinking.

Homi Bhabha (1994, p. 172)

Overview

This chapter extends the discussion on paradigms to show the relationship between methodology, methods, and philosophical assumptions about the nature of reality, knowledge and values, and theory. Postcolonial indigenous theory and critical race theory are discussed as potential decolonizing tools that rupture the hegemonic Euro-Western methods that see "the world in one color" (Guba & Lincoln, 2005, p. 212). This chapter presents case studies that will enable you to understand how colonial research served the interests of the colonizers and how critical theoretical frameworks are used to inform the design, analysis, and reporting in a study with a postcolonial indigenous research perspective.

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LEARNING OBJECTIVES

By the end of this chapter, you should be able to do the following:

1. Discuss the role of postcolonial indigenous theory and critical race theory in indigenous research.

2. Critique the universal application of mainstream research methods from the perspective of postcolonial indigenous theory and critical race theory.

3. Understand the resistance of the researched communities to imposed knowledge systems and the implications of that resistance for research.

4. Acquire skills that will enable you to be a critical reader of research studies.

Before You Start

Discuss the quotations at the start of this chapter in relation to the experiences of the colonized and those historically marginalized by the colonizing Western-based research tradition. Do you think there are any suppressed knowledge or value systems belonging to the colonized that could inform the construction of research knowledge? Think of the colonized as all those hurt by the colonizing Euro-Western research tradition, for instance, the formerly colonized, indigenous peoples, the deaf, the immigrants, women, and girls in these societies.

INTRODUCTION

An anticolonial critique framework, using critical theory, postcolonial discourses, and critical race-based theories, is challenging every discipline to assess how knowledge production and theories of the past and the present have been shaped by ideas and power relations of imperialism, colonialism, neocolonialism, globalization, and racism. Postcolonial studies have shown that no subject area or theory, be it biology, physics, language, mathematics, Marxism, or feminism, has escaped Eurocentric colonialism and modern imperialism or globalization (Said, 1993). In Chapter 1, you learned that scholars are expressing their criticism about what they view as the dominance of Euro-Western methodologies, which marginalize indigenous knowledge of the colonized and historically oppressed. Evidence is mounting about the failures of research-driven interventions that draw from mainstream research epistemologies. Arturo Escobar (1995), in *Encountering Development: The Making and Unmaking of the Third World,* documents the failures of research-driven development projects in the third world, while Robert Chambers (1997), in *Whose Reality Counts: Putting the First Last,* documents the errors

in research-driven development projects that arise when mainstream research methodologies are used among communities in developing countries. Aaron M. Pallas (2001, p. 7), in a discussion of educational research, proposes that to prevent a recurring pattern of "epistemological single-mindedness, educational researchers should engage with multiple epistemologies" that include beliefs about what counts as knowledge. Lauren J. Young (2001), Pallas (2001), Reba N. Page (2001), and Mary Haywood Metz (2001) argue that novice researchers and graduate students should be prepared to deal with epistemological diversity.

It is important to give space and listen to the voices from these historically silenced groups and those who sympathize with them to learn about other epistemologies and other ways of knowing. For many reasons, this is a noble undertaking at this point in time.

- Indigenous knowledge and local knowledge have become important in the emerging global economy, with observers noting that "the basic component of any country's knowledge system is its indigenous knowledge" (Economic and Social Development Department, 2006, p. 9).

- An increased volume of research on the colonized Other is funded by international organizations, amid a growing realization that Euro-Western-based research methodologies fail to capture the experiences of these colonized Others (Chambers, 1997; Chilisa, 2005; Chilisa & Ntseane 2010; Escobar, 1995; Nitza, Chilisa, & Makwinja-Morara, 2010).

- An increased number of international and transnational researchers are committed to writing on methodologies and carrying out research that promotes social justice, human rights, and democracy (Mertens, 2009, 2010a, 2010b).

- The emerging trend where "the knowledge paradigms of the future are beginning to develop by reaching out to those excluded to move together towards a new synthesis" (Fatnowna & Pickett, 2002, p. 260) shows the growing need to hear from multiple voices, including those who critique mainstream research and those who write on postcolonial/indigenous epistemologies.

- Indigenous knowledge and local knowledge systems are already part of the global dialogue with regard to ethics, copyrights, and the production of knowledge, increasing the need to internationalize postcolonial indigenous research epistemologies and methodologies.

In Chapter 1, you learned about the following strategies for decolonization:

- Deconstruction and reconstruction as strategies for discovering and recovering the past to inform the present and future

- Self-determination and social justice in research

- Implementation of ethical frameworks that promote rights and ownership to knowledge produced

- Implementation of research using indigenous languages

- Excavation of the past to know our history and thus promote self-determination and social justice in research

- Mobilization of communities to internationalize indigenous knowledge systems

- Critique

- Paradigms and their philosophical and theoretical underpinnings, methodologies, and techniques of gathering data

In this chapter, I expand the discussion on decolonization as a process that engages with imperialism, colonialism, and globalization to understand the assumptions and values that continue to inform research practices that privilege Western thought and the resistance of the majority two thirds of the world's population to this privileged knowledge. Postcolonial theories and critical race feminist theories provide a framework with which we can discuss imperialism, colonialism, and globalization as processes with assumptions and values that legitimized Euro-Western methodologies and further build deficit literatures communicated in dominant languages, such as English, about the colonized Other. The contribution of feminist theory to indigenous research is discussed in Chapter 13. Let us commence with a discussion of postcolonial theories.

POSTCOLONIAL AND INDIGENOUS THEORIES

Postcolonial theories discuss the role of imperialism, colonization, and globalization and their literature and language in the construction of knowledge and people's resistance to imposed frameworks of knowing. It takes a poststructural view of the world with the aim of deconstructing truths, beliefs, values, and norms that are presented as normal and natural and presenting them as politically and socially constructed. Postcolonial theory engages with issues of power. In the context of research, it enables scholars to interrogate power relations that arise between researchers and the researched, for example, when choices are made about the literature to be reviewed, the theoretical frameworks, research questions, or techniques of gathering data (for example, tests). These power relations come with "Othering" ideologies, which see the world in binary opposites of colonizer/colonized Other, first world/third and fourth world. Postcolonial theory pays attention to how race and ethnicity interact with class, gender, age, and ableness in interlocking forms of oppression. (Chapter 13 discusses postcolonial indigenous feminist theories and methodologies.) In addition, it exposes how academic discourse uses Othering ideologies to make sense of the world along binary opposites, which devalue indigenous knowledge and marginalize the voices of the colonized Other.

Postcolonial discourses also look at the resistance to the colonizing methodologies by researchers who chart other ways of doing research that are culturally sensitive to those colonized by the Euro-Western research tradition. Postcolonial theorizing is useful in

indicating a general process of colonization and counterattempts by the colonized Other to disengage from the colonial syndrome. The resistance is a challenge to Western-educated indigenous researchers, demanding that they begin to interrogate their multiple identities as colonizers participating in the Othering of their people through the use of Western research methodologies and as peripheral Others marginalized by the global network of first world research elites and by global markets that continue to define and determine knowledge discourses on the basis of global market prices. It is in this context that a relational ethical framework in indigenous research is essential.

Postcolonial Theory Critique

Indigenous scholars (Grande, 2000; Smith, 2000) have argued that postcolonial theory can easily become a strategy for Western researchers to perpetuate control over research related to indigenous peoples and the colonized Other in general, while at the same time ignoring their concerns and ways of knowing. The argument is that postcolonial theory is a version of critical theory and thus born of a Western tradition that emphasizes individuality, secularization, and mind-body duality (Grande, 2000). Values of the colonized Other, such as concepts of family, spirituality, humility, and sovereignty, are most likely to be missed in a postcolonial research approach that draws from critical theory. Gerald Vizenor (1994) calls for the inclusion of *survivance* in postcolonial theory. The concept of survivance goes beyond survival, endurance, and resistance to colonial domination, calling for the colonizers and the colonized to learn from each other. The postcolonial indigenous theory envisioned in this book includes the concept of survivance and the recognition of indigenous knowledge as a rich source from which to theorize postcolonial indigenous research methodologies.

Augmenting the debate, Eve Tuck (2009, p. 413) notes that research based on postcolonial theory has a tendency to look to historical exploitation, domination, and colonization to explain contemporary brokenness, such as poverty, poor health, and so on. This is a pathologizing view that focuses on damage, ignoring the wisdom and hope of the researched. The alternative, she proposes, is a desire-based research framework, where desire "is about longing for a present that is enriched by both the past and the future" (Tuck, 2009, p. 417). Here, Tuck invokes the space in between, also termed the "third space" in postcolonial theory, to explain desire-based research frameworks. I have used the term *postcolonial indigenous theory* to emphasize indigenous theorizing and indigenous knowledge as essential ingredients in postcolonial theory. Postcolonial indigenous theory thus gives researchers the tools to theorize indigenous research, indigenous research paradigms, and culturally integrative research approaches. What follows are aims of research informed by postcolonial indigenous theory.

Research Aims

Catriona Macleod and Sunil Bhatia (2008) have identified three aims of research informed by postcolonial theory:

1. *Researching back.* This process examines our history, deconstructing how postcolonial subjects have been theorized, produced, and reproduced and

reconstructing the present and the future, which carries some hope for the oppressed. Researching back involves interrogating colonial discourses, imploding their political partisanship by introducing in strategic points of their critiques subaltern texts that see the colonial moment differently, that use other knowledges—as distinct from Western—to articulate another view of the self, of history, of knowledge–power formations, resisting in the process the burden of colonialist epistemology and in fact mounting a counterassault by enabling previously disabled languages, histories, [and] modes of seeing the world (Mishra, 2000, p. 1086).

2. *Theory-driven research.* The second aim is conducting contextually relevant and theory-driven studies that emphasize how the oppressed, in the struggle against the assault on their identities by Western methodologies, borrow theories from across cultures and academic disciplines and adopt a mixed method research approach. The mixed method research approach can range from a design that imposes indigenous worldviews on a predominantly Euro-Western paradigm or a design that uses a postcolonial indigenous paradigm but borrows some Euro-Western methods to a culturally integrative approach with a balanced borrowing from Euro-Western paradigms and postcolonial indigenous paradigms.

3. *Liberatory and transformative intent.* The third aim is to produce knowledge that has a liberatory and transformative intention. In Chapter 12, you will learn how the development of action research impacted research methodologies, leading to indigenous struggles for voice, representation, and the transformative intent of research with the historically oppressed. Chapter 12 discusses change-focused research based on appreciative inquiry (Ludema, Cooperrider, & Barrett, 2006) and desire (Tuck, 2009). You will learn about contemporary research practices that place greater importance on people's existential realities, lived experiences, discursive practices, emotions, and cultural sensitivities and examine how these elements can contribute to community development and ongoing community action.

In what follows, I go back to history to interrogate and question the Euro-Western archives of methods to enable an appreciation and revaluing of the indigenous knowledge, languages, and ways of knowing devalued in Euro-Western research tradition. I will present the Porteus Maze tests as an example of methodological imperialism in colonial research, showing how methods were manipulated to create binaries of the knowers and the ignorant.

RESEARCHING BACK: METHODOLOGICAL IMPERIALISM

There is a debate over whether methods and their rules are sometimes allowed to claim methodological hegemony, so that methods tell researchers how they must see and what they must do when they investigate. The rules imposed on the researchers, it is argued,

carry with them "a set of contingent and historically specific Euro-American assumptions" (Law, 2004, p. 5). Colonial research, it is argued, contains incontestable evidence of the manipulative ability of research to prove and perpetuate the dominance of one race over another (Ramsey, 2006). A case study that shows the use of a test as a method of collecting data is presented to illustrate methodological imperialism. As a researcher, you can revisit some of the research studies carried out in former colonies to review the use of research techniques in those studies. The assumption is that when we know about the past, we can deconstruct it and rupture the myth of the superiority of data-gathering techniques such as tests, questionnaires, and observation as neutral instruments in the construction of general knowledge and theories on formerly colonized societies.

One of the main techniques of gathering data during the colonial period was observation. So powerful was the sense of seeing that, for those who could not be there to see, ethnography became a discipline of "culture collecting" (Smith, 1999, p. 61), displaying collections of both human remains and animals. The Other was seen as an object of study through observation and public display. Thus, Richard A. Oliver (1934), writing on the mentality of the African, observed,

> The main method up until now has necessarily been observation—observation of the behaviour of Africans in natural, everyday situations; and the result of this method has been the description of such behaviour. To this method, we owe almost all our present knowledge of the mentality of the African; and it seems likely that this must for a long time remain the chief source of knowledge. (p. 41)

Using the observation method, anthropologists in Africa transformed descriptions of daily life of Africans into theories about the mental ability of Africans, about the child-like race, the impulsive Africans, and the passive onlookers (Blaut, 1993; Schumaker, 2001). In such cases, the colonizers, through their research, established themselves as the authorities on African cultures. Africans were not consulted on the researchers' interpretation of the observed data. Consequently, Africans are always shocked to read these anthropological collections, which depict their cultures as barbaric or inhuman. Obviously, such research was a powerful instrument for legitimizing colonialism since it justified the agenda of the colonizer, whose mission was defined as the duty to civilize.

Researchers need to be familiar with these debates on methods and techniques, as well as the evidence of how methods and techniques were manipulated to perpetuate the dominance of one race over the other. The Porteus Maze, which was used as a test of intelligence among Africans in the 20th century, is an example of how techniques could be manipulated to privilege the dominance of one race over another, or the colonizer over the colonized. Following is Oliver's (1934) description of the Porteus Maze.

The Porteous Maze Tests as Tests of Intelligence

In these tests, the subject is presented with printed plan of a maze, and he has to trace with a pencil the path he would follow in getting to the center of the maze. If he enters blind alleys, he fails. The mazes form a series, graded in difficulty, and constituting an age scale of intelligence. A European child, when he reaches a maze beyond his mental age, tends to enter a

blind alley and explore it to the end and then to retrace his path to the entrance of the blind alley and go on again. He penetrates the center of the maze quickly enough but with many errors. The typical procedure of the African tested was different. The subject would study the maze for many minutes without making a move, then he would trace his path to the center without hesitation or error. The test had to be abandoned as a test of intelligence, for even the most difficult mazes in the series were solved in this way by too many of the subjects. But this experience made me wonder about the African's alleged impulsiveness (Oliver, 1934, p. 44).

In the above tests, the results were at odds with colonial ideology that labelled Africans as ignorant and Europeans as intelligent, hence the tests were abandoned. The colonial research practice was dualistic, hierarchical, and dependent on maintaining patterns that always privileged one race. Researchers observed, saw, and then named. All other research approaches sought to reproduce the "Other from a Euro-Western eye." The questionnaires, interviews, and tests sought to create the Euro-Western white male as the norm against which the Other was judged. When attributes allocated to the Euro-Western white male appeared more frequently in the Other who was judged primitive, then the instruments were declared unreliable and lacking validity. This was methodological imperialism—a strategy to build a collection of methods, techniques, and rules calculated to market only that knowledge that promoted and profited Eurocentrism.

The following are the questions we ask:

1. What is our role as researchers when we come across such literature on techniques?

2. Have research methods changed, or have they maintained Euro-Western perspective?

3. How can we as researchers use the Porteus Maze test to reconstruct the past and modify the body of literature on the tests on intelligence for example?

Resistance to Methodological Imperialism

Methodological imperialism, it should be noted, was not without resistance. There are many ways in which the researched in former colonized societies continue to resist imposed knowledge production frameworks. Chapter 3 presents case studies of former colonized societies' resistance to imposed Western-informed ways of knowing. In *Africanizing Anthropology,* Schumaker (2001) shows how local research assistants in today's Zimbabwe mediated the anthropologist's initial exposure to the societies they studied, through their translation work, introductions to potential informants, smoothing of the way for the researcher's questions, and general management of the researcher's interactions with local people. She argues that research assistants interpreted for the researchers, who did not speak the local languages, while at the same time protecting the local society and the interests of some of its members. In addition, local interpreters came to the anthropologist through local channels of power rather than through the researcher's choosing. African royals or educated elites controlled the researcher through handpicked interpreters of their choice. The researched could, when they wanted to protect themselves, give unreliable data to the researchers. In one instance, a researcher noted, for instance, that in a village where she had collected demographic data, the researched confessed how they had lied, making the figures collected unreliable. Schumaker (2001) notes, "In all cases, the relationship between the researcher, the assistants, and the informants had to some degree, an antagonistic character" (p. 94).

In some parts of Africa, entry into a research site, for instance, a village, is sanctioned by the chief. The researcher first obtains consent to do research from the chief, who then informs the people about the research. The relationship between the researcher and the research assistants, where the researcher might not know the local language and the researched, still remains a matter of concern and raises many questions about validity and reliability of research findings in former colonies. The relationship is also a reminder that research is not always an initiative of the researched and that it is at times regarded as an intrusion into their lives. Indigenous research methodologies, therefore, explore ways of making research a partnership between the researcher and the researched.

Academic Imperialism

The current global political economy still features overt domination over who can know, who can create knowledge, and whose knowledge can be bought. The term *academic imperialism* refers to the unjustified and ultimately counterproductive tendency in intellectual and scholarly circles to denigrate, dismiss, and attempt to quash alternative theories, perspectives, or methodologies. Lee Jussim (2002) notes that within American psychology, behaviorism in the period 1920 to the 1960s is one of the best examples of intellectual imperialism. Behaviorists, he notes, often characterized researchers taking nonbehaviorist approaches to psychology as nonscientific. For colonized, historically oppressed, and marginalized groups, intellectual imperialism speaks to the tendency to exclude and dismiss as irrelevant knowledge embedded in the cultural experiences of the people and the tendency to appropriate indigenous knowledge systems in these societies without acknowledging copyrights of the producers of this knowledge. Most colonized societies were thought of as primitive, barbaric, and incapable of producing useful knowledge.

In Africa, for example, Levy Buhl denied Africans south of the Sahara "properties of ratiocination and its cognates" (Kaphagawani, 2000, p. 86). The consequence of Buhl's theses was to deny that there could be an African philosophy or African philosophers and to claim that philosophy is Greek or European (Oruka, 1998). Those dismissing the existence of African philosophy claim that philosophy must be a written enterprise, and accordingly, a tradition without writing is incapable of generating philosophy. This denial of the existence of other knowledge systems is not unique to philosophy. It is still current practice in academic debates to invoke Euro-Western belief systems and methodologies to dismiss as irrelevant knowledge from former colonized societies, indigenous peoples, and historically oppressed groups. Susan Easterbrooks, Brenda Stephenson, and Donna Mertens (2006) note, for instance, that research in the field of deaf people focuses on the abilities that the deaf people lack rather than the abilities they have; viewing deafness as a deficiency is a way for the people in power to keep control of academic knowledge and power in their hands.

In some cases, the conflict is with publishers, reviewers of manuscripts, and other gatekeepers of knowledge over what can be said. My experience as a writer theorizing on postcolonial indigenous methodologies is another testimony to monopolies on knowledge production. In a book project, one of the reviewers of my manuscript had difficulties in opening space for research methodologies informed by African worldviews. The reviewer noted,

There are difficulties in getting Africans involved in the theorising and building of knowledge on ways of conducting research. You have to address questions such as how do you test the validity of your findings . . . by African or Western standards. What language do you use to build a research community and how do you research, store, and transmit the accumulated knowledge? Arguably, the whole idea of research belongs to the north/western paradigm, so probably some Africanness will have to be sacrificed in the process.

The argument in this book is that the colonized should be the center for the production and storage of information and knowledge produced about its people. The indigenous knowledge systems of these communities should provide answers on how knowledge is validated, sources of evidence and credibility of interpretation of research findings, and methods of dissemination of the research results. Postcolonial indigenous theories and critical indigenous theories offer tools to expand the borders and boundaries of Euro-Western methodologies to include subjugated knowledges and to empower the colonized majority.

Analytical Tool: Blaut's Theory

James M. Blaut's theory on the colonizer's model of the world offers a useful analytical tool that researchers can use to expose misconceptions, prejudices, racism, and stereotypes in the review of literature. In *The Colonizer's Model of the World,* Blaut (1993) reveals the role of European diffusionism ideology in constructing dichotomies of colonizer/colonized. He defines diffusionism as the claim that the rise of Europe to modernity and world dominance is due to some unique European quality of race, environment, culture, mind, or spirit. Blaut (1993) distinguishes two historical epochs in his theorization of diffusionism and the rise of Europe to dominance. The first period was marked by an inside/outside relationship constructed on the basis of a world with a permanent center from which all ideas and technology tended to originate and a periphery that must borrow from the center for change and development to occur. The inside/outside relationship begins with colonization, when Westerners propagated the myth that those living in the colonies-to-be lacked intellectual creativity, spiritual values, and rationality, thus justifying the displacement of natives from their lands. The diffusionism ideology enabled the division of the world into binary opposites of inside/outside, center/periphery, colonizer/colonized, and first world/third world. The colonizer/colonized binary had evolved over time, and at each historical point, it scripts the social license by which its ideas gain currency and hegemony. Table 3.1 captures Blaut's binary opposites on Western/European and non-European/Other.

Blaut's construction of the colonizer's model of the world can be used as an analytical tool to interrogate the literature we read and the way we conduct research. The researcher can use these binary opposites to identify deficit theorizing, damage-focused assumptions, prejudices and stereotypes in the literature reviewed, the methodology, the analysis, and interpretation in a study.

TABLE 3.1 ■ Binary Opposites on Western/European and Non-European/Other	
Characteristics of Western/European	**Characteristics of non-European/Other**
Inventiveness	Imitativeness
Rationality, intellect	Irrationality, emotion, instinct
Abstract thought	Concrete thought
Theoretical reasoning	Empirical, practical reasoning
Mind	Body matter
Discipline	Spontaneity
Adulthood	Childhood
Sanity	Insanity
Science	Sorcery
Progress	Stagnation

Source: Blaut, J. M. (1993). *The colonizer's model of the world: Geographical diffusionism and Eurocentric history*. New York, NY: Guilford Press. Used by permission.

POSTCOLONIAL THEORY AND LANGUAGE

Postcolonial theories critique the dominance of Euro-Western languages in the construction of knowledge and argue that indigenous languages can play significant role in contributing to the advancement of new knowledge; new concepts; new theories; and new rules, methods, and techniques in research that are rooted in former colonized societies' ways of knowing and perceiving reality. Language plays an important role in the research process (1) as a medium of communication; (2) as a vehicle through which indigenous knowledge can be preserved during fieldwork; and (3) as a symbol of objects, events, and experiences a community considers worth naming. It is widely accepted that communities use language to develop conceptual frameworks and ways of thinking about their lived realities and everyday lives (Hoppers, 2002; Mazrui, 1990). Language holds people captive, and their way of talking reflects their thinking and who they are. Despite its important role in knowledge construction, research knowledge continues to be produced, communicated, and disseminated in dominant languages.

In his book *Decolonizing the Mind: The Politics of Language in African Literature,* Ngugi wa Thiong'o (1986a, pp. 1–30) discusses language as a colonizing instrument. Recalling his own educational formation, how English-language use was enforced, and how African literature in English continues the legacy of colonization, he shows that the content and the arrangement of English literature in many African universities privileges the Western canons and, more fundamentally, alienates students from their culture, worldview, environment, and continent. Ngugi wa Thiong'o discusses at length

how the postcolonial intellectuals of Africa have now become the promoters of English language, hence, systematically annihilating indigenous languages and continuing the legacy of colonialism.

> The biggest weapon wielded and actually daily unleashed by imperialism against that collective defiance is the cultural bomb. The effect of a cultural bomb is to annihilate a people's belief in their names, in their languages, in their environments, in their heritage of struggle, in their unity, in their capacities and ultimately in themselves. It makes them see their past as one wasteland of non-achievement and . . . it even plants serious doubts about the moral righteousness of the struggle. (p. 3)

The critique on language is an attempt to sensitize researchers to the role of language in the production of knowledge and to further challenge researchers to explore the use of the historically oppressed groups' languages in the construction of new theories, concepts, techniques, methodologies, and analysis procedures across disciplines. Easterbrooks et al. (2006) argue, for instance, that research for the deaf with the deaf has to explore the use of deaf language because dominant hegemonic methods have a tendency "to filter out any potentially deaf-centric stance" (quoted in Lane, 1999, p. 71). The following abstract shows current attempts in research to construct new concepts derived from the use of indigenous languages of the oppressed.

Indigenous Economic Concepts (T. Tsuruta, 2006)

Examining four well-known Swahili words, *utani, chama, ujamaa,* and *ujanja,* Tsuruta offers some tentative and exploratory comments on "indigenous" moral-economic concepts in Tanzania. These terms convey not only notions about social relations but also relations which one could consider economic, along with unique cultural connotations. Various things Westerners consider separate are impossible to disentangle in these concepts; joking and mutual aid, dance and politics, wit and cunning, all related to people's subsistence economy. These phenomena cannot easily be put into prearranged Western categories nor should they be disregarded from a modernist perspective because these concepts and practices reflect a rich tradition of self-help solutions in Africa, thereby serving as a source of imagination for alternative visions of economic development (Tsuruta, 2006).

Literature and Deficit Theorizing

Colonialism—in the form of the universal application of Western-based research methodologies and techniques of gathering data across cultures—and the subjectivity of researchers are among the factors that have created a body of literature that disseminates theories and knowledge unfavorable to the colonized Other. This body of literature threatens to perpetuate research that constructs the researched colonized Other as the problem. The challenge for researchers is how to manage the literature that informs our research studies, where the literature that is available on the colonized Other is written by outsiders and the literature by the colonized Other is predominantly oral.

In research, the literature review plays an important role in conceptualizing research topics, choosing the research designs for the study, and analyzing and interpreting the results. The golden rule for novice researchers is that they should always read the literature to help them choose a researchable topic, focus the research questions, provide a theoretical basis for analyzing findings, legitimize their own assumptions, and give credit to and acknowledge the strength of previous findings. One major limitation of this approach is that the concepts, the theories, and the research studies conducted and the literature on former colonized societies have been written by missionaries, travelers, navigators, historians, anthropologists, and so on, who in most cases looked on the researched as objects with no voice in how they were described and discussed. This literature and body of knowledge continues to inform our research practices. The theories and literature have not been favorable to historically oppressed and former colonized societies. Noting these assaults by the literature and the theories, Linda T. Smith (1999) observes,

> Indigenous people have been in many ways oppressed by theory. Any considerations of the ways our origins have been examined, our histories recounted, our arts analyzed, our cultures dissected, measured, torn apart and distorted back to us will suggest that theories have not looked ethically at us. (p. 38)

Western-educated scholars need to investigate the psychological harm, humiliation, embarrassment, and other losses that these theories and body of knowledge caused to the researched colonized Other. They also need to use the body of indigenous knowledge about the researched to counter theories and other misinformation that may cause communities humiliation and embarrassment.

Resistance to Dominant Literature

Postcolonial indigenous research methodologies provide an important framework through which Western-educated researchers can explore the possible biases in the literature we read, identify the knowledge gaps that have been created because of the unidirectional borrowing of Euro-Western literature, and bring to a halt the continuing marginalization of other knowledge systems that occurs because of the dominant Euro-Western research paradigms and their discourses on what can be researched and how it can be researched. Applying indigenous research methodologies to research with and about the colonized Other should involve going back and forth to retrieve marginalized and suppressed literatures to review, analyze, and challenge colonizing and deficit theorizing and interpretation, to create counternarratives that see the past differently, and to envision a transformative agenda with the researched. It also involves defining what literature and theorizing in the context of former colonized societies is. Postcolonial indigenous research methodologies perceive literature as language, cultural artifacts, legends, stories, practices, songs, rituals, poems, dances, tattoos, lived experiences such as the people's fight against HIV/AIDS, personal stories, and community stories told during weddings, funerals, celebrations, and wars. When I speak about

songs as literature, this song by O. Mutukudzi always comes to my mind because, in my view, it captures the realities of HIV/AIDS beyond what the academic discourse can manage:

Senzeni What shall we do?

Ooooh toddii?

What shall we do? Senzi njani X3

Verse 2

How painful it is to nurse death in the/your hands!

What shall we do?

How. . .

What shall we do . . .?

(Verse 1 repeat)

Source: Excerpt from Mutukudzi, O., *Greatest Hits: The Tuku Years 1998–2002.* Harare: Frontline Promotions.

In the song, the artist resists cooption into the dominant discourse on HIV and AIDS that insists on using a standardized science laboratory language that is constructed on the basis of a cause-effect relationship to describe people's experiences. The artist does not mention the term HIV/AIDS. He sings about the realities seen through another lens, and we know it is about what has been named by the Westerners HIV/AIDS. Mainstream discourse about HIV/AIDS usually involves statistics on infection and the number of condoms sold, a Western measure of profits made in Western capital markets masquerading as genuine concern for the spread of HIV/AIDS and the problem with the historical colonized Africans. In the song, the pain of nursing death resonates with people's experiences. People in Africa have come up with many labels and names that describe their daily experiences with HIV/AIDS. These have been invariably labeled irrelevance, ignorance, beliefs in sorcery, barbaric cultural beliefs, simplistic and uncivilized thinking, belief in witchcraft, and so on. Such songs and the daily descriptions of people's experiences of what happens in their families and communities provide arguments to discursive regimes of representations that seek to construct Africans as the problem. What seems to be the problem is an attempt to standardize the language that describes people's experiences with HIV/AIDS and to insist on communicating in a science laboratory language that is constructed on the basis of a cause-effect relationship. Consequently, former colonies continue to operate two knowledge systems on HIV/AIDS, a global knowledge system marketed by the West and a knowledge system that is built on the experiences of the people and the values that inform the practices. The resilience of the people's knowledge challenges the

single-mindedness of Western-driven interventions directed toward halting the spread of HIV/AIDS in Africa and in the third and fourth world in general. This makes urgent an expansion of the boundary of what it means to review literature from the perspective of the historically colonized, the marginalized, and the oppressed. Researchers should not delude themselves that literature constitutes only the written text. Rather, they should ask how each society produces and stores knowledge. In most indigenous societies, knowledge is stored in songs, sayings, rituals, jokes, and stories surrounding an issue of community concern.

ACTIVITY 3.1

Read the study extract included here and answer the following questions:

1. Discuss the features of a study that reflect a postcolonial framework.

2. What reasons does the researcher give for using an eclectic theoretical framework as well as eclectic interpretive methods?

3. List the data sources and the methods used in the study and their appropriateness in achieving the aims of research with a postcolonial framework.

Source: Kaomea, J. (2003). Reading erasures and making the familiar strange: Defamiliarizing methods for research in formerly colonized and historically oppressed communities. *Educational Researcher, 32*(2), 14–25. Used by permission.

Background to Study

Since the first pilot kupuna program in 1980–1981, Native Hawaiʻian elders have become a pivotal part of the Hawaiʻian studies curriculum. According to students, teachers, principals, and district specialists who speak highly of the program, the kupuna are "invaluable resources" in the teaching of the Hawaiʻian culture and language and also bring a special feeling of "warmth and aloha" to the elementary school classrooms. The kupuna epitomize Hawaiʻian cultural values and the aloha spirit and provide positive intergenerational exchanges for those children who do not have grandparents of their own (Afaga & Lai, 1994).

On the surface, it looks and sounds like a wonderfully conceived program, one whose virtues are acknowledged by teachers, children, and administrators alike. Personally, as a Native Hawaiʻian who has been raised to honor the wisdom of my elders, it initially brought me great joy to see Hawaiʻian kupuna resuming a larger role in the cultural education of Hawaiʻi's youth. However, as my more extensive investigations into this program later revealed, there is much more (and less) going on with this kupuna program than initially appears.

Methodology

To delve beyond surface appearances, I used classroom observations and interviews with kupuna in eight elementary schools across Hawaiʻi, along with reviews of related program documents, to develop a critical analysis of this long-cherished program. Beginning with a look at students' artwork and written reflections on the kupuna's classroom visits, I employed various defamiliarizing interpretive techniques to look beyond the initial and overwhelmingly positive impressions of the familiar, manifest text. I also examined the subtext, or that which has been put under erasure. Through the persistent uncovering of silences and erasures in this program, I defamiliarized taken-for-granted perspectives on this much-applauded curriculum and rendered this familiar program "strange."

This defamiliarizing inquiry into the Hawaiʻian studies kupuna program serves as a reply to contemporary calls for antioppressive (Kumashiro,

2000, 2001) and decolonizing (Smith, 1999) research methodologies that look beyond familiar, dominant narratives and give voice to the previously marginalized or voiceless. In response to these requests, this study employs a variety of defamiliarizing techniques drawn from literary and critical theory, in concert with Native Hawaiʻian cultural traditions, to force readers into dramatic awareness of previously silenced perspectives on the lesser known aspects of this highly praised curriculum. Through a careful analysis of the kupuna program's many silences, absences, and erasures, this defamiliarizing study reveals the various ways in which numerous Hawaiʻian kupuna are systematically misused and abused in Hawaiʻi's public elementary schools.

Theoretical Framework

Consistent with the logic of postcolonialism and its suspicion of grand theories and narratives (Bhaba, 1994; Said, 1978; Spivak, 1987), my theoretical framework and interpretive methods are intentionally eclectic, mingling, combining, and synthesizing theories and techniques from disparate disciplines and paradigms. Writing as a Native Hawaiʻian in the middle of the Pacific, far removed from the academic center of the metropolis, I do not have the luxury of attaching myself to any one theoretical perspective but instead "make do" (de Certeau, 1984) as an interpretive handyman or bricoleur (Levi-Strauss, 1966; see also Denzin & Lincoln, 1998).

Throughout this study, I draw widely from an assortment of structuralist and poststructuralist theorists, moving within and between sometimes competing or seemingly incompatible interpretive perspectives and paradigms. Consequently, this study has both a deconstructive playfulness as well as a Marxist earnestness. It engages with Jacques Derrida's (1976) notions of deconstruction and erasures as well as Karl Marx's (1886/1977) concern with deep structures and material effects. At the same time, it consciously and unapologetically privileges Native Hawaiʻian philosophies and concerns. Although I do not deny the possible

contradictions between these various theoretical perspectives, I believe that postcolonial studies require such theoretical innovation and flexibility. If we are to meet the demands of postcolonial studies for both a revision of the past and an analysis of our everchanging present, we cannot work within closed paradigms (Loomba, 1998).

Discussion and Conclusion

I do not doubt that the Hawaiʻian studies kupuna program was well intended at its inception, and I have seen—and reported on elsewhere (Kaomea-Thirugnanam, 1999)—a few situations in which Hawaiʻian studies kupuna have effectively contested or resisted the restrictions of this state-mandated curriculum and used their positions to function as positive agents for social change or "cultural production" (Levinson & Holland, 1996). However, after uncovering the many ways in which numerous other kupuna have been disempowered and disembodied in Hawaiʻi's schools, I am made aware of the many challenges of implementing a progressive, liberating Hawaiʻian curriculum within a system whose goals may, in many respects, be incompatible with—or even hostile to—Hawaiʻian self-determination and empowerment. For in every instance when Hawaiʻian kupuna are incorporated into the school system as handmaidens of the larger state apparatus, the Hawaiʻian studies kupuna program is effectively turned on its head and is ultimately made to serve ends inimical to its original, progressive intentions.

With the aid of these defamiliarizing tools, anti-oppressive researchers working in historically marginalized communities can begin to ask very different kinds of questions that will enable us to excavate layers of silences and erasures and peel back familiar hegemonic maskings. Building upon Friedrich Nietzsche's (1881/1964) "insidious questions," we can begin to ask, What does this textbook passage, classroom dialogue, interview transcript, or curricular artifact intend to show? What does it intend to draw our attention from or conceal? What does it seek to erase?

CRITICAL RACE THEORIES

In addition to postcolonial theory, critical race theory interrogates Euro-Western methodology, using race as its tool of analysis. Critical race theory reveals how race functions to construct rules, norms, standards, and assumptions that appear neutral but that systematically disadvantage or subordinate racial minorities (Vargas, 2003, p. 1). It has its roots in law and gained visibility in the 1970s and popular currency in the 1980s and early 1990s (Vargas, 2003). Critical race theory takes a transformative approach, asserting that through knowledge and critique of how race operates "to mediate and color the work we do," researchers can reconsider the practices, methods, approaches, tools of data collection, and modes of analysis and dissemination of results so that research promotes justice and is respectful and beneficial to racial minorities. Out of this critique has emerged what is termed *race-based methodologies* (Pillow, 2003), which insist that current Euro-Western methodologies are based on white-race colonizing ideologies. Race-based methodologies are adopted by scholars writing from the vantage of the colonized Other.

The characteristics of critical race-based research methodologies include the following:

1. A challenge to dominant ideologies

2. Importance of interdisciplinary approaches

3. Emphasis on experiential knowledge

4. The centrality of race and racism and their intersectionality with other forms of subordination and commitment to social justice

5. History as the foundation of knowledge, the body of experience, and voice from which to work

6. Rethinking language as the source of knowledge

ACTIVITY 3.2

Read the study extract included here, and answer the following questions:

1. Discuss the features of a study that reflect a decolonization of mainstream methodologies.

2. Discuss the role of storytelling and counterstorytelling in privileging voices of those at the margins.

Source: Solórzano, D. G., & Yosso, T. J. (2001). Critical race and LatCrit theory and method: Counter-storytelling, Chicana and Chicano graduate school experiences. *International Journal of Qualitative Studies in Education, 14*(4), 471–495. Reprinted by permission of the publisher (Taylor & Francis Group, http://www. informaworld. com).

Purpose of Study

This article is an attempt to inject into the race discourse the multiple forms of racism in

graduate education for Chicana and Chicano students and to answer the following questions: How do the structures, processes, and discourses of graduate education and the professorate reinforce racial, gender, and class inequality? How do Chicana/o graduate students and professors respond to race, gender, and class inequality?

Methodology

In order to integrate critical race theory with the experiences of Chicanas and Chicanos in graduate education, we use a technique that has a tradition in the social sciences, humanities, and the law—storytelling. Delgado (1989) uses a method called counter storytelling and argues that it is both a method of telling the story of those experiences that are not often told (i.e., those on the margins of society) and a tool for analyzing and challenging the stories of those in power and whose story is a natural part of the dominant discourse—the majoritarian story (Delgado, 1993). For instance, while a narrative can support the majoritarian story, a counternarrative or counterstory, by its very nature, challenges the majoritarian story or that "bundle of presuppositions, perceived wisdoms, and shared cultural understandings persons in the dominant race bring to the discussion of race" (Delgado & Stefancic, 1993, p. 462). These counter stories can serve at least four theoretical, methodological, and pedagogical functions: (1) they can build community among those at the margins of society by putting a human and familiar face to educational theory and practice; (2) they can challenge the perceived wisdom of those at society's center by providing a context to understand and transform established belief systems; (3) they can open new windows into the reality of those at the margins of society by showing the possibilities beyond the ones they live and demonstrating that they are not alone in their position; and (4) they can teach others that by combining elements from both the story and the current reality, one can construct another

world that is richer than either the story or the reality alone (Delgado, 1989; Lawson, 1995). Storytelling has a rich and continuing tradition in African-American (Berkeley Art Center, 1982; Bell, 1987, 1992, 1996; Lawrence, 1992), Chicana/o (Paredes, 1977; Delgado, 1989, 1955a, 1966; Olivas, 1990) and Native American cultures (Deloria, 1969; Williams, 1977; Delgado, 1989, 1995a, 1996). Delgado (1989) has stated, "oppressed groups have known instinctively that stories are an essential tool to their own survival and liberation" (p. 2436). We want to add to the tradition of counterstorytelling by illuminating the lives of Chicana and Chicano graduate students, who are often at the margins of graduate education. As a way of raising various issues in critical race theory and method, we offer the following counterstory about two composite characters engaged in a dialogue. One is Professor Leticia Garcia, a junior sociology professor at a Western University (UC-Oceanview). The other is Esperanza Gonzalez, a third-year graduate student at the same university in the education department. Using our definition of critical race theory and its five elements, we ask you to suspend judgment, listen for the story's points, test them against your own version of reality (however conceived), and use the counterstory as a theoretical, conceptual, methodological, and pedagogical case study (see Barnes et al., 1994).

Discussion

Indeed, critical race and LatCrit methodology challenges traditional methodologies, because it requires us to develop "theories of social transformation, wherein knowledge is generated specifically for the purpose of addressing and ameliorating conditions of oppression, poverty, or deprivation" (Lincoln, 1993, p. 33). Counternarrative-as-qualitative method, exemplified in this article as a conversation between two Chicana academics, allows us to explore the breadth of what

(*Continued*)

(Continued)

happens through the structures, processes, and discourses of higher education, as well as the depth of how and in what ways Chicanans/os respond. We concur with Denzin & Lincoln (1994) as they describe that, "the multiple methodologies of qualitative research . . . within a single study may be viewed as a bricologe, and the research as bricoleur. . . . The combination of multiple methods . . . within a single study is best understood, then, as strategy that adds rigor, breadth, and depth to any investigation" (p. 2). This strategy has allowed us to look to the experiential and other forms of knowledge from people of color and subordinated peoples, whose knowledge has often been excluded as an official part of the academy. We believe strength of critical race and LatCrit theory and methodology is the validation and combination of the theoretical, empirical, and experiential knowledge. Through our counternarrative, we delve into lives of human characters who experience daily the interactions of racism, sexism, and classism. We look to continue this methodological, theoretical, conceptual, and pedagogical journey as we also express our deep gratitude and dedicate this work to those both inside and outside the academy who share their stories with us.

Postcolonial theory and critical race theory share the same aim of critiquing Euro-Western methodologies and seeking to promote methodologies that privilege the disenfranchised, dispossessed, and marginalized colonized Other in the third and fourth worlds. Both have a liberatory and transformative intent, and research using these frameworks thus shares the same investigative practices and methods. Catriona Macleod and Sunil Bhatia (2008) give examples of qualitative studies using a postcolonial framework and the methods they employ. The latter include colonial discourse analysis, narrative analysis, historiography, genealogy, organizational analysis, case study, ethnography, comparative research, participatory action research, deconstruction, and visual analysis. See Table 3.2.

TABLE 3.2 ■ Examples of Qualitative Research in Postcolonialism		
Methods Used	**Data Source**	**Brief Explanation**
Colonial discourse	Mostly written texts and archives	Analysis of discourse (often but not always Foucauldian) highlighting (neo)colonial construction of the other
Narrative analysis	Interviews, autobiographies	Exploring the conditions of possibility in which the colonized and colonizing subjects emerge
Histography	Archives, texts	Reading against the grain to uncover blind spots and recuperate evidence of subaltern agency
Genealogy	Texts, archives	Using Foucauldian notion of descent to trace the emergence of colonial subjects and objects
Organizational analysis	Texts, organizational records and arrangements, interviews, training videos, observation	Analysis of (neo)colonial institutional practices and power relations

Case study	Interviews, participant observation, records	In-depth study of specific case (group, organization, or individual) in which (neo)colonial power relations are manifested
Ethnography	Interviews, archives, texts, observations	A decent practice that overcomes its colonial history by examining the subject position of the ethnographer, collapsing the *us* and *them* assumption and privileging local knowledge
Comparative research	Interviews, archives, texts, observations	Contextual analyses of systems (often educational) or texts in ways that undermine the West as the given
Participatory action research	Participation in individual and group dialogue and action	Accountable research that is driven by participants and focuses on change within a given (neo)colonial setting
Deconstruction	Texts, interviews	Employment of Derridean concepts such as *différance* to expose exclusions and absent traces in (neo)colonial discourse
Visual analysis	Images (e.g., art, films, landscapes, drawing)	Analysis of images as signifiers of (neo)colonialism

Source: Macleod, C., & Bhatia, S. (2007). Postcolonialism and psychology. In C. Willig & W. Stainton-Rogers (Eds.), *The SAGE handbook of qualitative research in psychology.* London, UK: Sage. Used by permission.

SUMMARY

This chapter has discussed postcolonial theory and critical race theories as important analytical tools to use to interrogate the universal application of Euro-Western methodologies across cultures. Using these theories as analytical tools reveals the biases, distortions, and misconceptions about the colonized Other that are legitimized by the accumulated body of literature and the use of dominant languages in research. The chapter proposes that the researched communities' language, cultural artifacts, legends, stories, songs, rituals, poems, and dances are important sources of literature that should inform problem identification and formulation, research theoretical frameworks, and meaning making, as well as legitimizing research findings. Chapter 9 discusses the place of language in research, while Chapters 10 and 12 discuss community-centered methods of knowledge production.

Key Points

- Research ignores the history of colonization and imperialism and its impact on the colonized Other.

- There is a need to critique mainstream history, colonialism, imperialism, and globalization in research methods courses so that methodologies, theories, and literatures are understood as practices seeking to see and know realities in diverse historical moments bound with politics and power.

- Scholars are engaged in an ongoing attempt to decolonize research methodologies.

- In postcolonial indigenous research, it is important to avoid damage-focused research and employ desire-based research frameworks and frameworks that include research as survivance.

ACTIVITY 3.3

1. Discuss the terms *imperialism, colonization,* and *globalization.* Explain how you can apply each of these terms to a critical review of the following:
   a. Methodological approaches and techniques of gathering data as neutral and applicable to people across cultures
   b. Literature as a building block for formulation of research proposals and frameworks for discussing research findings
   c. The role of language in research

2. Through a search of literature, identify a research study, and, using Blaut's construction of the colonizer's model of the world, review the study for assumptions, prejudices, and stereotypes, if any, that informed the choice of study, its formulation, reviewed literature, and discussion of the findings.

3. Discuss literature from the perspective of indigenous research methodologies.

4. Discuss the role of language in research.

Suggested Readings

Blaut, J. M. (1993). *The colonizer's model of the world: Geographical diffusionism and Eurocentric history.* New York, NY: Guilford Press.

Deloria, V. (1995). *Red earth, white lies: Native Americans and the myth of scientific fact.* New York, NY: Scribner.

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