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**Helena Kubátová**

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## Research into Transformations in Everyday Life: Three Methodological Notes<sup>1</sup>

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**Abstract** The article focuses on the reflection of my research experience in obtaining qualitative data using narrative interviews. I confronted my own research experience with the phenomenological methodology of Alfred Schütz, dramaturgical sociology of Erving Goffman, and interpretative sociology of Max Weber. The article discusses three problems that emerged during a longitudinal study of everyday life transformation in the long-term horizon of sixty years: 1. How to create a concept of everyday life so it serves not only as a tool for collecting, analyzing, and interpreting data, but also as a tool for understanding the meanings of the examined empirical world; 2. How to discursively create an image of everyday life transformations during an interview between a participant and a researcher and what it means in relation to the research subject; 3. How to reach understanding between the participant and the researcher during a face-to-face interview.

**Keywords** Everyday Life; Narrative Interview; Understanding; Temporality; Historicity; Generation Gap; Life-World (*Lebenswelt*); Social Reality; Phenomenological Sociology

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The objective of the article is to discuss three methodological problems that gradually emerged during my five-year qualitative research in the micro-regions of Silesian Hlučín and Moravian Království. The article does not focus on spe-

<sup>1</sup> This manuscript was written within the framework of the project "Social Sciences 2016" (IGA\_FF\_2016\_049) funded by the Palacký University Olomouc.



cific research results,<sup>2</sup> but on the issue of obtaining qualitative data, that is, the researcher's interview with a participant (communication partner).<sup>3</sup> It is an analysis and interpretation of my research experience. The long-term stay in the field, increasing the number of interviews (more than 200 in the end) and multiplying field notes, gradually brought me to issues of how reality is formed during interviews and how and to what extent it is possible to reach understanding between a researcher and a participant. Such thorny questions occur when a researcher stays in the field for a long time, uses more research techniques, and repeatedly returns to communication partners. That is why I would like to reflect on my research practices in this article.

The objective of my qualitative research was to create a grounded theory of the transformation of the suburban countryside in the Moravian-Silesian Region<sup>4</sup> and its everyday life based on an emic approach in order to present the understanding of the (historical) transformation of rural everyday life as seen, perceived, reflected, and assessed by the rural people themselves.<sup>5</sup> I defined countryside as an area formed by everyday practices perceived as rural and by a wide range of everyday representations of the "ordinary" population. This area generates stable patterns of behavior, emotions, and meanings that affect everyday rural life (cf. Halfacree 1993; 2006).

<sup>2</sup> Published research results, see: Kubátová 2013; 2014; 2016a; 2016b; Kubátová et al. 2015; Anýžová, Kubátová, and Znebežánek 2016; Anýžová, Kubátová, and Matějů 2016.

<sup>3</sup> For the purposes of this text, the terms "communication partner" and "participant" are used as synonyms.

<sup>4</sup> The Czech suburban countryside is formed by rural municipalities located in the hinterland of regional cities.

<sup>5</sup> On the possibilities of generalizing qualitative research cases, see: Flyvbjerg 2006.

The research methodology (data collection, their analysis, and interpretation) was based on this research question: How has the perspective of the suburban countryside population on rural everyday life changed from the 1950s to the present day? The selected emic approach to the transformation of rural everyday life motivated the selection of qualitative research methods and techniques. The data were mainly collected and analyzed using the grounded theory method (Corbin and Straus 1990; Strauss and Corbin 1997). The main method of data collection was a narrative interview. The context of the data collection and analysis were data from the Czech Statistical Office on selected social, demographic, and economic indicators, and the "large" history of Czechoslovak/Czech society since the end of the Second World War. The theoretical framework of the research was formed based on the phenomenological sociology of Alfred Schütz and Thomas Luckmann (Schütz 1944; 1945; 1953; 1954; 1962; 1964; 1966; 1970; 1981; Schütz and Luckmann 1973).

Based on the self-reflection of my research practices and reflection of relevant aspects of phenomenological sociology, three methodological problems will be successively discussed:

1. Forming a concept of everyday life as a tool for empirical research. In my opinion, forming a concept is a key act of qualitative research, since it contributes significantly to the formulation of the research problem, the definition of the research subject, and selection of the research strategy. How to define a concept so it serves not only as a tool for collecting, analyzing, and interpreting data but also as a tool for

understanding the meanings of the examined empirical world?

2. The research subject as a discursively formed image of everyday life transformations. As the aforementioned research question implies, transformations over a long period of sixty years were investigated, which brought the issue of everyday life temporality and the possibilities of an adequate sociological approach to it to the center of the research problem. The past of everyday life cannot be monitored directly, and it is necessary to draw on witnesses' memories. What does it mean to study a past that exists only in memories?
3. Understanding between the participant and the researcher during a face-to-face interview. In such a situation, is it methodologically useful to create two worlds, a world of science and a world of everyday life, and try to be a disinterested observer?<sup>6</sup>

## 1. Creating the Concept of Everyday Life

Even though my research objective was to analyze changes in everyday life from an emic perspective, my concept of everyday life is not based strictly on the ordinary thinking of people. According to the phenomenological sociology of Alfred Schütz (1964), on which my research was based, researchers examining everyday life should keep their distance from its immediate perception. In my view, this can be achieved by forming a heuristic sensitized concept

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<sup>6</sup> From the empirical perspective, these three problems partly overlap and their separation is more analytical.

of everyday life as a tool for data collection, as well as for data analysis and interpretation. As Blumer (1969) claims, heuristic concepts are sensitized because they help explain the meanings of the relevant empirical world.

My creation of a concept was based on the methodology of ideal types formed by Max Weber (1949), which was later followed by Schütz (1964). Ideal types are constructed based on empirical facts to which participants assigned a cultural significance. The researcher subsequently selects those which correspond to their theoretical interest. As Weber says, it is important that a created concept was simultaneously adequate to the subjective meaning of the participants' actions, as well as to the research question. It must neither be too empirically empty (i.e., theoretic), because then it would not correspond to the empirical world, nor too rich in content (i.e., empirical), because then it would only be a description of reality with a small range (cf. also Hekman 1983). Weber's requirement is reflected in Schütz's (1954) assumption about the specific meaning of social reality for human beings who live, act, and think in it. The world has already been interpreted by people's everyday constructs and they experience it as their everyday reality. Scientists' objects of thought must be based on people's objects of thoughts.

For that reason, I combined the theory and experience when forming the heuristic concept of "everyday life." The theoretical basis for this was Schütz's concept of the everyday life and life-world on the one hand, and the sociological conceptualization of a way of life as a relatively stable pattern of every-



day behavior within a specific life situation utilizing available resources, on the other hand. The empirical source for the creation of the heuristic concept was the structure of the life-world identified in a pilot field study. In the pilot survey, I used as many research techniques as possible (e.g., unstructured interviews, unstructured disinterested and interested observations,<sup>7</sup> examination of municipal chronicles, etc.).

When creating a concept, I proceeded from the fact that everyday life is embedded in rural social relationships, which can be implied not only from the formulation of the research problem but also from the phenomenological assumption that the world of everyday life is a socio-cultural world in which we relate to our neighbors in various ways and in various degrees of anonymity and intimacy (Schütz 1954). Everyday life is therefore approached as an intersubjective phenomenon manifesting the values, norms, needs, and wishes of people, their interests and goals. It takes place in social reality, which I understand in accordance with Schütz (1954) as a reality that is experienced in the everyday thought of people who were born into it and had to learn to live in it.

The world of everyday life is, together with the world of dreams, fantasy, and science, a part of the life-world, an umbrella term as considered by Schütz (1962). It is a framework forming a unity of these four sub-worlds, while the world of everyday

life represents the paramount reality. It is a world of work, pragmatic approach, and practice, which is not the dominant subject of thinking, but a world of action and practical orientation in it (Schütz 1962; 1966; Schütz and Luckmann 1973).

Based on these theoretical and empirical resources, I defined everyday life as a world of experience and a key reality of the life-world, as a sum of practices, strategies, interpretations, and social interactions that people use when earning a living and living their domestic lives, in which the everyday life is not only reproduced but also transformed. I focused on the *understanding* of earning a living and household chores as practices and life strategies of individuals who perform them in everyday, ordinary situations. Schütz (1954) claims that human behavior can be understood only when we understand people's motives, choices, or plans rooted in their biographically determined circumstances. For that reason, everyday activities could not be just described; I had to understand their motivations, which, as I assumed, arise from satisfying biological, emotional, and social needs.

Two types of time may be associated with the concept of everyday life—cyclic and linear. Cyclic time is related to the regular repetition of activities and the rhythm of passing days. While cyclic time stabilizes everyday life, linear time transforms it due to historical events, institutional and system changes, and even biological changes, which are framed in individual life stories. Linear time refers to two transformation axes: biographical (in the form of a life career or life story) and historical (cultural and political). I thusly understand everyday life as

<sup>7</sup> For example, balls, religious festivals, awarding important and successful personalities of the region, various meetings of citizen associations, and also family celebrations, ordinary family days, et cetera.

a changing space produced and reproduced by the routine repetition of habitual actions in recurring situations and settings, as well as by dealing with the cultural, historical, and political transformations of values, norms, and institutions and with transformations biographically associated with life stages, life career phases, and life experience. In other words, everyday life consists mainly of recurring activities related to earning a living and home life. These actions, including their motivations, are also culturally, historically, and biographically determined, so they acquire various cultural and individual expressions and meanings throughout the historical and biographical time.<sup>8</sup>

Life is a continuous stream of changes, both in terms of the “big” history and in terms of biography and career. Everyday life is therefore discontinuously continuous. It passes in stages and phases, and the consequences of one stage become enabling or limiting conditions of the following stage. The research of everyday life shows that people often do not cope with radical changes in their life by replacing their old everyday life with a new one, but by embedding the new everyday life in the old one. Everyday life is characterized by momentum because it strongly opposes institutional and political changes. People do not change their life radically. This is because each present everyday life contains its past in the form of past experience. Decisions made in the past have a significant effect on the present and the future.

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<sup>8</sup> In addition to that, some actions are at a certain time in the communication partner’s everyday life background (e.g., childcare, when they do not have children or they no longer live with them; the public sphere under communism) and some of them in the foreground (e.g., work at the time of economic activity; the private sphere under communism).

The knowledge of the past motivation and strategies adapted by people helps understand their present motivation and strategies. Hence, if we want to understand the present of everyday life, it is necessary to explore its past. As written by Chris Hann (2015), the past, present, and future must be analyzed simultaneously.

## 2. The Research Subject as a Discursively Formed Image of Everyday Life Transformations

To examine everyday life transformations over a long period of sixty years means to examine a past that exists only in memories, that is, a narrated past.<sup>9</sup> This generates a methodological question of what is actually being investigated.

My invitation to talk about the participants’ everyday life past made them reflect on the yet unreflected, which breached their everyday life and changed it into non-everyday life. This is because it is typical of everyday life that it relies on implicit and unspoken meanings to a significant extent. As I already mentioned, everyday life for Schütz (1962) is a world of practice, which is not the dominant subject of thinking, but a world of action and practical orientation in it (cf. Schütz and Luckmann 1973). Everyday actions are routines based on everyday knowledge, which is largely inexplicit and unspoken. This results from the fact that the life-world is a natural world of common sense that is not questioned in

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<sup>9</sup> The past can be also explored by analyzing personal documents, such as letters or journals. I could not, however, use these documents to an extent sufficient for my research objective due to their highly intimate nature.

the natural attitude and is comprehensible to every member of the community as a world that humans perceive as a normal and natural fact, as a given fact to which they are forced to adopt an active, practical, or pragmatic attitude and act. While talking about the past may reveal certain unreflected upon and undisclosed meanings of everyday life, most of them still remain hidden and unreflected upon.

Moreover, everyday perception is significantly reduced. We do not realize the majority of impulses or we do not focus on them; we only perceive them partly because they are not exciting, they are natural, fit into what is normal and repeat without end: our living room, my office, my colleagues, Sunday family lunch, et cetera. Another reason people do not reflect on their actions is because they act under the influence of practical logic. As written by Pierre Bourdieu (1990), people are fully absorbed in their matter, their task, their affairs. They do not project their actions, they act based on their pre-perceptual anticipation arising from the harmony of the habit and field, which produces a deep doxic belief in the world that they do not realize. I therefore assume that the situation of a research interview about past everyday life makes participants reflect on it in retrospect. If we inquire about their practical experience, we are forcing them to adopt an attitude, making them observers of their own practical experience and leading them to create quasi-theories about it.<sup>10</sup>

<sup>10</sup> This problem was also addressed by Schütz (1953) using the motives of “in-order-to” and “because.” Participants living in the ongoing process of their actions reflect only on the “in-order-to motives” of their actions, that is, the projected state of affairs to be undertaken. Only if they return to their already performed actions or to past phases of still ongoing action anticipating the act, participants may retrospectively grasp the “because motives” that led them to do what they projected to do. Then the participants do not act—they observe themselves.

Given the above, I was aware that I was not primarily investigating a participant’s logic of everyday life and its transformations, but the “discourse” in which participants narrate, for example, the way they lived and live, worked and work, what their home looked like before and what it looks like today, et cetera. I understand the concept of discourse neither as an “order of discourse,” that is, rules allowing the creation of individual testimonies (cf., e.g., Foucault 1973), nor as a linguistic term that refers to any text longer than a single sentence (cf., e.g., Crystal 2008). I use the term discourse to describe narrative (discussion) situations about a certain topic in the form of a dialogue between the participant and me as a researcher. I assume that discourse consists of verbalized and semantically shared knowledge. The discourse of past everyday life shows an image of everyday life transformation in participants’ memories in the form of auto-stereotypes and positive and negative aspects of everyday life: how I lived, what I was like, et cetera. At the same time, as participants talked about their specific everyday practice, they assigned meaning to its components, evaluated them, talked about their motivations and strategies, et cetera. I could watch how the participants discursively created or constituted their everyday life during the interview.<sup>11</sup> I began to observe the way the participants shape their information so that it forms acceptable images of what they experienced. I perceived more that everyday life is discontinuous and only narration makes it a complex entity.

<sup>11</sup> At this point, I began to approach the issue of oral history, which works with narratives that are perceived as images of participants’ life events or life events of someone else verbalized by participants. The purpose is not to determine what happened in the past, but to reveal the interpretation of an individual or a group (cf., e.g., Bertaux, Thompson, and Thompson 1993; Thompson 2000).

Or, as Berger and Luckmann (1966) state, individual actions are shaped according to interrelated parts of life at the moment people think about their lives. We can assume that there is a relationship between the participant's practical logic and the narration because the participant is in a discourse with the researcher about what actually happened long (or not so long) ago. However, the participants' "quasi-theory" of their own past of everyday life corresponds semantically with the present, that is, the point in time when the past is being described.

That is why the dramaturgical sociology of Erving Goffman (1959) soon became part of my research field. Using his metaphor of theater, I started to reflect on what I initially mostly ignored. For example, how participants produce their past everyday life as a film and compose individual scenes as directors when they are talking. They decide which scenes to cut and which to keep based on the current situation, but they reinterpret the scenes for the purposes of a new performance for the researcher, therefore changing their motivation, reinterpreting meanings, et cetera. Participants select individual scenes for their film about past everyday life for a specific purpose, for example, to give a good account of themselves or to make me understand their narration. That is why they initially do not present their normal behavior in everyday life, their private world of an improvised and spontaneous (or routine) character, but instead present their official (and therefore comprehensible) social roles of the public world.

Goffman's theater metaphor makes it tempting to understand a qualitative face-to-face interview as a theater performance. In my opinion, however,

Goffman (1959) does not address aspects of theater that penetrate everyday life. He deals with the structure of social encounters, while the key factor of this structure is to maintain a uniform definition of the situation. The metaphor of theater is included in the assumption that this definition has to be expressed (introduced), and this expression has to be maintained despite a number of potential disruptions. To present a definition of the situation means that the actor makes an impression upon the observer. The observer has to rely on this impression, which, of course, creates the possibility for the actor to distort reality by manipulating the impression given to the observer. This could mean that every social encounter is hypocritical and deceptive. In fact, however, Goffman argues that everyday life is surrounded by a number of courtesy, etiquette, and moral norms. While there is always the possibility that the observed person is manipulating the impression, this is not a rule.

The participant, therefore, constitutes a definition of the situation. This almost always results in surface consistency in defining the situation because it is not expected that participants will express their true feelings and honestly agree with the feelings of others. Instead, it is expected that participants will suppress their immediate feelings and that their statements will be at least partially respected and thereby they will avoid open conflict caused by different interpretations of the situation. In ordinary encounters, participants are allowed to rationally interpret and justify their actions.

However, a research situation is not ordinary. On the contrary, I, as a researcher, wanted participants to

express their true feelings and not to suppress them, to step out of their official social roles and reveal their private world to me. This can be at least partially achieved by disrupting the working consensus. At the beginning of an interview, however, it is necessary to work together with the participant in creating a working consensus for at least some time by using protective corrective mechanisms, particularly by tactful protection of the participant's interpretation of the situation and by respecting their opinion. At this point, the information I gained before the interaction is of key importance. In order to obtain information relevant to my research, I then tried to disrupt the smooth interaction by ceasing to respect the surface consistency in the situation definition. I asked questions that are perceived as unthinkable, or at least inappropriate, in common situations because they undermine the requirement of courtesy required in common situations as a part of a personal facade. For example, I asked about membership in the Czechoslovakian Communist Party, actions in the period of collectivization of agriculture, et cetera. The fact that participants had the advantage of authenticity because I did not experience much of what they were talking about at first forced me into defensive and affirmative solidarity and compassion. Later, however, I tried to resist this impulse. I wanted to get behind the participants' stylization of their own lives, get further than just to their staged lives; at the same time, however, I was aware that if I overdo this, I would break the rules of interaction and destroy the whole research situation.

This procedure enabled me to move from participants' official roles to their private life. But, in situations in which participants reflected on their private

world, they basically used uniform discourse about the past of their everyday life. In other words, the longer the period they were thinking back to was (i.e., the older the participants were), the more their testimonies of past everyday life resembled each other. It can therefore be concluded that shared communication memory intervened in their discourse on the past as one of the collective memory sectors. Like Assmann (2006), I understand it as a living memory passed on between three or four generations of contemporaries through speech. I proceed from the fact that memories are selected due to the influence of this memory of the majority because memory tends to adapt to constantly changing images formed within social groups. This is apparently the reason why individual participants' memories of the long past of everyday life were typically identical. According to Halbwachs (1992), collective memory provides a generation group with an image of itself; it is continuous and consists of live elements of group consciousness. Memories of individuals are associated with the group to which an individual belongs or belonged and in the memory of which they are stored.

It can be said that each generation has its own history. That is why introducing historical context into the research, that is, linear time of everyday life, is problematic. Although the participants whose past and present everyday life I examined were my contemporaries because we shared a place and time during the interview, I was aware that there are generational differences in terms of our knowledge of the world. Schütz (1954; 1981) solved this problem by believing that the everyday world is important for us universally, and therefore assumed that despite



all the differences in the individuals' knowledge of the world, everyday knowledge of the everyday world is sufficient to live with our neighbors, cultural objects, and social institutions in social reality.

I agree that we can certainly live with them because the generational embeddedness of individuals in everyday situations does not create any serious problems. However, in a research situation, the difference in generational experience can significantly intervene in the research subject. I soon noticed my communication partners anticipated that what their peers would consider normal and standard I would not or could not necessarily have to consider normal and standard. That is why they tried to explain, interpret, or even reinterpret and normalize their past everyday life to me. My research experience is more consistent with what Karl Mannheim (1954) surmised, that is, that differently generationally embedded people have different aspect structures that determine how a person sees a certain thing, understands it, and constructs facts. My experience with research interviews shows that this problem is not identical to Schütz's (1953; 1954), but describes differences between individual perspectives leading to the current participant's knowledge being only potential knowledge of persons related and vice versa. It therefore cannot be solved by Schütz's reciprocity of perspectives because even though it allows living and standardized understanding in the social reality, it does not solve the problem of fundamental understanding during an interview. The problem of the influence of the "generation gap" on shared meaning between the participant and the researcher is clearly visible in a situation in which we examine changes in everyday life in a society that was

going through a period of major historical and political twists.<sup>12</sup>

The past in witnesses' memories, which is not static and is always dependent on their present, also intervened in the research subject. When thinking about the past, the participants drew on their current biographical situation and used their current systems of relevance. They related their memories from the perspective of the "here and now." They evaluated their real past actions from the present day perspective. Therefore, it is significant to mention that most of my communication partners were at least 60 years old and were recalling their memories between the years 2012-2016. If they recalled memories of the late 1970s or around 1989, their stories would certainly differ from the current ones in the evaluation of the past, choice of the relevant events, and their expectations of the future. Therefore, no research result can be removed from its temporally conditioned semantic context.

The research subject of the change in everyday life through participants' stories is not the practice of everyday life and its practical logic, but an image of the history of everyday life discursively created by the communication partners, while the shape, structure, and meaning of such an image are significantly influenced by many circumstances mentioned above: reflection of the yet unreflected, reduced perception, memory selectivity, communicative

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<sup>12</sup> In the Czechoslovakian context, it is especially the communist takeover in February 1948, the Warsaw Pact troop occupation of Czechoslovakia in August 1968, the following so-called normalization period, the Velvet Revolution in November 1989, and the following liberalization and democratization of society and introduction of a market economy.



memory, the generation gap, and the intervention of the current biographical situation and system of relevance. This raises the question of whether the researcher and the participant can actually understand each other during the interview. The problem of understanding will be discussed in the last part of the article.

### 3. Understanding between the Participant and Researcher during the Interview

First, I briefly describe the interview situation. As mentioned above, within the pilot field study essential for creating the heuristic sensitized concept of everyday life, I conducted several unstructured in-depth interviews and both structured and unstructured observations, including an analysis of available documents. After I had constructed a working version of the concept of everyday life, I began to design a semi-structured interview script consisting of topics relevant to my research subject.<sup>13</sup> I modified the traditional approach to the narrative interview, which does not allow for additional questions about reasons for the communication partner's behavior (see, e.g., Bertaux and Kohli 1984), according to my needs. I asked questions to improve my understand-

<sup>13</sup> During the gathering of data, the script was adapted to newly acquired findings and empirical data; it gradually became more focused on the research problem that also crystallized from the empirical data. The script served as a tool to help following the thread of the interview. It was important to let the participant talk about issues I had not expected, and therefore had not included in the script. Although my aim was to keep the everyday life topic in my previously defined structure, I wanted to preserve the emic perspective and not impose topics upon the participant. The script allowed me to maintain control over the interview content, and despite the textbook rules, I am of the opinion that the topic should be decided upon not only by the participant but also by the research problem.

ing<sup>14</sup> and also to discover motivations, since I sought to *understand* the acts of earning a living and doing household chores as practices and life strategies of individuals who perform them on an everyday basis. As mentioned above, Schütz (1954) claims that human behavior can be understood only when we understand their motives, choices, or plans rooted in their biographically determined circumstances. In order to understand, I tried to utilize everything the interview reveals besides the actual answers of participants. That is, the external scenery, such as apartment or house furnishing, books, kitchen, garden, yard, et cetera, people sharing the household with the participant, and other information on the same topic received from other participants. The understanding was also facilitated by family photographs spontaneously shown by the participants to document their stories.

The participants usually invited me to interview them at their home; therefore, I could also observe the environment in which they lived. As mentioned before, I soon began to view the interview as an encounter (Goffman 1959). Goffman's principles helped me to better understand the research situation, uncover participants' efforts to control the definition of the situation, and notice the research interview disrupting the surface consistency in the definition and the effect thereof on the research situation. I also became conscious of small details I had ignored until that point. I realized that by selecting and staging the scene, the participants controlled the situation to some extent. Everything depended

<sup>14</sup> In addition, questions keep the interview going. For example: "Do you remember? At that time, I was doing this and that, what about you?" "What was it like when you had to...?"

on the definition of the initial situation formulated by the participant based on our phone conversation prior to my visit and, with the increasing number of interviews in a set region, also on the reputation of my interviewing technique, which had spread quickly. I had operated in the field for many years and people from the region communicated their knowledge about the interview procedure to one another; therefore, the presentation facade (of individual interviews) had gradually stabilized. Soon, I was also able to anticipate the participants' definition of the situation, their narrative focus, what they would show me in their home, what food they would offer, et cetera. Participants also tried to control their personal facade concerning their appearance and behavior and had certain expectations about my personal facade, that is, my appearance, manner of speaking, gestures, interview preparation, et cetera.<sup>15</sup>

My face-to-face contact with the communication partner and the repeated visits very soon led to the question if and to what extent we could achieve mutual understanding during the interview. Alfred Schütz's phenomenological sociology offers certain techniques to achieve this.

According to Schütz (1954), it is necessary to distinguish between knowledge within everyday meaning and knowledge as a method specific to social sciences. Schütz does not view understanding primarily as a scientific method, but rather a specific form of experience we use within our everyday thinking

to identify our socio-cultural world and live in it. Schütz assumes that the world is experienced in everyday thinking in a standardized form. The participants are given objects and events, and which of their features or qualities they consider unique and which standard depends on their current interests and system of relevance. Interests and the system of relevance are determined biographically and situationally and are subjectively experienced in everyday knowledge as systems of behavior motives, choices to be made, projects to be conducted, and objectives to be achieved (cf. also Schütz 1970; Schütz and Luckmann 1973).

Schütz (1954) claims that a second participant can understand these motives, choices, projects, and objectives (and through them the first participant's behavior) only in their standardized form. Therefore, in the everyday world, participants construct standardized patterns of participants' motives, objectives, attitudes, and personalities, and their current behavior is nearly a case or example of such. These standardized knowledge constructs replace the personal world knowledge of individual participants. Everyday world knowledge is based on fundamental idealization known as the reciprocity of perspectives. According to Schütz (1953), this idealization overcomes the differences in individual perspectives stemming from the participant seeing something different than other participants and their different biographical situations. This overcomes the problem of participants' current knowledge being nearly the potential knowledge of persons related and vice versa.

However, Schütz (1954) claims that a social scientist is supposed to approach the social world differently.

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<sup>15</sup> Schütz's phenomenology defines a self-standardization phenomenon: by standardizing the behavior of others we standardize our own behavior in connection with theirs (Schütz 1953).

Social scientists have a cognitive rather than practical interest in the situation and are not involved in it. They replaced their personal biographical situation with a scientific one, meaning they eliminated the system of personal relevance controlling their everyday interpretations and originating in biographical situations and replaced it with the scientific problem.<sup>16</sup> The researcher then uses the formulated scientific problem when developing concepts, as well as scientific standardizations (i.e., scientific ideal types, so-called second-order constructs) through which he/she understands the participant's behavior and the life-world. According to Schütz (1954; 1964), social scientists observe certain facts and events in social reality and based on them create standard types (ideal types) of behavior or courses of action. However, they cannot overstep the boundary created by defining the scientific problem (postulate of relevance). They then coordinate these patterns with ideal participant models (so-called homunculi) which equipped the systems of relevance (i.e., standard practical purposes and objectives). Each homunculus is assumed to be related to other homunculi through interaction formulas. Each and every construct must be developed based on formal logic principles and must be adequate to the participants' everyday subjective world; therefore, it must be comprehensible to the partici-

<sup>16</sup> In this respect, Schütz (1954) follows Max Weber, who postulated the objectivity of social sciences by disconnecting them from value patterns which (may) control the participant's behavior on the social scene. However, I believe Weber (1949) complements his concept of the value neutrality of a scientist with the so-called value relationship, which he understands as a research gesture allowing research within a specific culture, with culture being a semantic framework giving meaning to behavior. Therefore, he emphasized the historical uniqueness and specificity of each cultural phenomenon. In my opinion, Schütz disregards the cultural specificity of a research problem, for he assumes cultural universalism.

pants (postulate of subjective interpretation). Schütz concludes that meeting these requirements ensures the compatibility of scientific constructs with both scientific findings and everyday life constructs. This compatibility ensures that social sciences deal with the real life-world, one world common to us all, not with fantasies independent on and disconnected with the life-world.

Schütz therefore postulates human understanding in everyday life using everyday knowledge and standardization, as well as scientists' standardization through their research problem. He assumes that the participant has current interests and a system of relevance determined both biographically and situationally. He further assumes that the participants have an appropriate cultural formula at their disposal determining relevance levels and functions as an unquestionable reference outline (Schütz 1944; 1945). On the other hand, scientists have their cognitive interests and relevance systems determined by a scientific problem.

In my opinion, a problem arises when we, as researchers, ask whether we can understand the participant during a face-to-face interview under such circumstances. In terms of such understanding, is it relevant to the researcher to proceed as Schütz suggests, that is, to create homunculi and other scientific standardization, to strive to disregard their everyday knowledge and relevancy systems determined by their biographical situation, to replace them with scientific knowledge and a system of relevance, and to elaborately ensure the adequacy of their scientific and participant's standardizations. Only if the researcher strives to accomplish the same as Schütz,

that is, achieve objectivity of scientific theories and subjective meaning in the everyday world. However, I believe that if we strive to truly understand the participants in a face-to-face interview, then such objectivity cannot be postulated. Even Weber (1949), to whom Schütz often refers, postulated only objectivity that is culturally conditioned, as it is always dependent on the values of the time.

Another important question is whether it can be ensured that researchers' systems of relevance stemming from their everyday life and biographical situation do not intervene in the interview. Based on my experience, I believe it cannot be ensured. My communication partners naturally strived for a normal symmetrical conversation and asked me personal questions, thus sending me back to my biographical situation. Dialogue and narration are essential elements of everyday communication. During the interview with the participant, the researcher must adapt to these everyday life techniques while the participant does not dispose of any other. However, if we follow Schütz's approach to scientific understanding as a second-order construct, we actually eliminate the participant, much like a quantitative researcher does through a questionnaire. Therefore, I believe that in order to understand, the researchers must keep their everyday knowledge (albeit controlled) and use it. During a face-to-face interview, they do not dispose of any other tool they could use to have a dialogue with the participants and thus understand them.

Let us ask a question: Where does the actual face-to-face interview between the researcher and participant take place? In the life-world? Undoubtedly,

because both the world of everyday life inhabited by participants and the world of science are part of the life-world. According to Schütz, no other world inhabited by both the researcher and the participant exists. Everyday life is the only framework in which scientific research can take place and where all scientific and logical concepts originate (Schütz 1954). Life-world is a place where the scientist's and participant's worlds meet. According to Schütz (1966), each interpersonal communication in the life-world presumes a similar structure of at least thematic and interpretative relevance. I believe that the narrative interview, despite being part of the research situation, is, at the same time, one of the basic forms of interpersonal communication. Therefore, the researcher needs to use even his/her everyday knowledge and the systems of relevance arising from it. While the participant possesses only one (everyday) system of relevance, the researcher always possesses two, since beside his/her scientific layers of relevance determining what is relevant to his/her scientific problem, he/she also possesses relevance used in everyday life.

My research experience leads me to the conclusion that in order to achieve the adequacy of scientific theory and participant's subjective world in the everyday world, the scientist cannot be removed from the social reality he/she studies. He/she cannot disregard his/her biographical situation and with it all the systems of relevance, practical interests, motives, and choices of a researcher as an inhabitant of life-world because he/she would lose one of the key sources of understanding of the participant in the face-to-face communication situation. The researcher in an interview situation cannot be a mere

objective observer; he/she must communicate with the participant in the true sense of the word. In this case, he/she cannot “communicate” only on the basis of his/her scientific relevance, but must also incorporate his/her relevance from the everyday world into the communication. Therefore, he/she has to bring his/her own life-world into the field. Naturally, aside from that, he/she has to possess a sufficiently sophisticated and defined scientific problem that must respect the life-world of the participants; otherwise the scientist does not deal with the real world, but the world of fantasy.

According to Schütz (1954; 1964), when we live in the same life-world common to us all, there is no need to construct two worlds, the world of everyday life and the world of science, in a dialogue even for methodological reasons. If we do so, we lose the ability to reach understanding with the participants in the life-world and we appear as socially naive and ignorant participants creating tools limiting their ability for understanding in face-to-face communication situations. In the jungle of complex methodology and scientific constructions, the participant becomes a chimera because his/her identity and the historical context of his/her life are lost.

The model of a rational participant and a rational world can serve very well for data analysis and interpretation. However, in my experience, this model is not efficient in the case of face-to-face research interviews. The theoretical and empirical term of everyday life (the creation of which I described in the first part of the article) and the everyday knowledge of the researcher are sufficient as research tools in such a situation. Unlike Schütz, I believe that re-

search situation and research problem must be relative to values of the time, since empirical data are unintelligible without cultural and historical context. Although we strive not to bring any scientific or everyday preconceptions into the research situation, we cannot prevent it. I believe that this is not a catastrophe threatening the validity of our results. Our scientific conclusions can always be only probabilistic, but the more they arise from our true understanding, the closer we get to the world of ideas of our communication partners.

## Conclusion

During my long-term research on the changes of the everyday life of inhabitants in two suburban rural regions, I often faced the question of how to approach and understand the life-world and everyday life of my communication partners. I believe that if I did not spend so much time in the field and go through so many narrative interviews, these questions would not be so important to me, and it is possible that I would not have noticed many of the aspects. In this article, I focused on the situation of the narrative interview and confronted my research experience with Alfred Schütz’s phenomenological methodology.

Schütz’s methodology provides good guidance for the solution of the first methodological problem (how to create the concept of everyday life) when connected with Max Weber’s methodology. I considered the creation of the concept of everyday life as a key step in qualitative research. This approach has paid off many times in the field because I had a transforming yet efficient tool for interview



observation and conducting. I consider the pilot field study to be the most important when creating a concept because the concept must be suitable for the subjective meanings of the participants researched. Naturally, I also built on the research question while creating the concept. It gradually brought me to the formulation of the dual temporality of everyday life, cyclical and linear. It is the linear time, whether historical or biographical, that transforms everyday life. Therefore, it is always necessary to remember the issue of time and analyze the present, the past, and the future simultaneously.

The analysis of the past everyday life opened a problem I discussed in the second part of this article. At the beginning, I asked a seemingly trivial question: What was I actually studying? I tried to demonstrate that by studying the past of everyday life in the long-term and its changes I was not studying the experience of everyday life, but the narrative of everyday life, that is, the discourse led by my communication partners about their experience. While using this discourse, they created an image of their past everyday life, the shape, structure, and meaning of which were significantly affected by many factors, some of which I have described. The theatri-

cal metaphor of Erving Goffman is very inspirational for a better understanding of the creation of this image and its meaning and structure.

In the final part of the article, I focused on the issue of an understanding between the participant and the researcher in the research interview situation. I described Schütz's dual definition of understanding—everyday and scientific. I asked myself whether it is efficient and relevant to the possibilities of understanding to construct a rational model of the participant and the social world and try to take the position of an objective observer. I tried to demonstrate on my own research experience that in the face-to-face communication interview the researcher would lose the possibility to understand the meanings of the participant's world when using second-order constructs. Second-order constructs can only be a result of research, not a tool. Moreover, I do not agree with Schütz's cultural universalism. In agreement with Max Weber, I believe that it is necessary to relate the research situation to historical and cultural values because it is impossible to understand the long-term transformations of everyday life of communication partners without a cultural and historical context.

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## **Community Immersion, Trust-Building, and Recruitment among Hard to Reach Populations: A Case Study of Muslim Women in Detroit Metro Area**

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**Abstract** Scholars have identified a range of factors that influence the ability of researchers to access hard-to-reach groups and the willingness of their members to participate in research. In this paper, we draw on insights from both ethnographic methods and participatory action research to demonstrate the importance of building trust in our relationships with hard-to-reach participants in research based on interviews. Such trust-building, we show, is greatly facilitated by pre-recruitment immersion that aids not only the recruitment of individual participants but also improves the quality of the data collected. These methodological concerns emerged from an interview study focusing on Muslim women's use of urban public recreational spaces in South-East Michigan. Although the first author of this paper, as a woman and a Muslim, is a formal insider in the study population, her experiences with recruitment demonstrate that the access granted by insider status is insufficient as grounds for a research relationship based on trust. This is so especially when the target population is as marginalized and embattled as the post 9/11 immigrant Muslim community. With more than two years of community immersion, however, she was able to foster enough trust to secure a large number of committed participants that spoke freely and thoughtfully about the issues at stake (78 in all).

**Keywords** Minority; Muslim Women; Community Immersion; Recruitment; Double Visioning; Qualitative Research; Hard-to-Reach Population; Interview

Researchers in different fields from urban sociology to public health have faced numerous challenges when it comes to accessing and recruiting research participants from so-called hard-to-reach populations and groups. Scholars have identified a range of factors and obstacles that influence both the ability of researchers to access such groups and the willingness of their members to participate

in research (Katigbak et al. 2015a; Mohebbi 2018). The present paper examines the utility of community immersion as an under-utilized recruitment tool to secure participants from hard-to-reach groups. More specifically, we address the limitations of established qualitative recruitment methods to access religious minorities, and argue that scholars, in focusing primarily on problems relating to access and

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initial contact, have not paid sufficient attention to the *quality* of the contact with participants in interview studies. Here we are drawing on insights from both ethnographic methods and participatory action research to demonstrate the importance of building trust in our relationships with hard-to-reach research participants. Such trust-building, we show, is greatly facilitated by pre-recruitment immersion that aids not only the recruitment of individual participants but also improves the quality of the data collected. In using the term quality we mean not simply, as if it were simple, issues related to the veracity of the data in relation to our own questions, but especially issues related to our ability as scholars to tap into that which is important to our participants.

The target population of the present study is Muslim women in Southeast Michigan. Due to their socio-economic characteristics, religious affiliation,

limited engagement with American society, suspicion of outsiders fostered by encounters with prejudice, and adherence to traditional gender ideologies, they are a hard-to-reach population. Therefore, any researcher interested in studying members of this community will face difficulties gaining access. The most widely used strategies for gaining access to such populations, used either singularly or in combination, are insider status and snowball sampling. This is how the first author of this study also began the research that this paper is based on. As a Muslim-born immigrant woman, she anticipated few problems recruiting Muslim women in the Detroit metro area, many of whom are also foreign-born, for an interview study on how they use public space (especially parks, walking trails, and bicycle paths). But, she quickly realized that her insider status on two important dimensions—gender and religion—was insufficient to garner enough trust and credibility in the population to secure participants. As

a result, she devised a new recruitment strategy that involved both immersion in the community of interest and an effort to engage women of the community in the project itself. This multi-pronged strategy was successful not only in terms of securing a sufficient number of participants but also in terms of trust-building. That is, as the participants got to know the first author and started trusting her as an insider, they were less guarded and more forthcoming in the interviews they participated in, both individually and, in some cases, as part of a group.

### How to Reach Hard-to-Reach Populations

A hard-to-reach population is a group of people that is not accessible *to the researcher* due to its race, ethnicity, value structure, language, political affiliation, geographic location, religion, criminality, or any number of other characteristics associated with the group and/or the researcher. Thus, the definition of a hard-to-reach population cannot be objectively determined, but instead is best viewed as a consequence of the interrelationship between the population and the researcher (Wahoush 2009; Sadler et al. 2010; Western et al. 2016).

Although still subject to debate, the most common solution to the problem of accessing hard-to-reach populations is to work through an “insider” or, preferably, be one yourself. But, what makes someone an insider? At the most basic level, scholars often treat major social statuses as insider/outsider categories; that is, scholars who claim membership in the status groups they study—gender groups, ethnic groups, racial groups—are insiders (Zinn 2001; Young 2008). But, as a fairly sizeable literature demonstrates,

there are numerous other group belongings, experiences, and/or characteristics that can serve insider purposes, including religion and religiosity (Widdicombe 2015; Ahmed 2016), motherhood (Brown and de Casanova 2009), experiences of domestic abuse (Malpass, Sales, and Feder 2016), length of residence (Crow, Allan, and Summers 2001), shared profession (Teusner 2016), friendship groups (Appleton 2011; Jenkins 2013), fashion modeling (Mears 2013), and criminal conviction (Earle 2014; Newbold et al. 2014).

And yet, the question of what makes someone an insider is rarely quite as simple as identifying a clear insider dimension, like race or gender, or a shared experience (Wacquant 2015). Rather, insider status is something that either emerges during “insider moments” (May 2014) or is negotiated in the interaction with research participants (Krilić 2011; Cui 2015). Thus, although scholars from a wide range of disciplines recognize the potential importance of the insider-outsider dimension when it comes to accessing a hard-to-reach population, few have found insider status to be sufficient for either gaining access in the first place or for the quality of data to be collected. Moreover, insider researchers are almost always also outsiders at least in their roles as academics (Hassan 2015; Mannay and Creaghan 2016). Nonetheless, insider status can help researchers get in the door, which is an important first step.<sup>1</sup>

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<sup>1</sup> Although the advantages that insiders typically bring to studies are well-documented, the evidence does not support a conclusion that outsiders therefore are unable to gain important insights (but see Young 2008). This can be so especially for outsider ethnographers, who sometimes use the process whereby they gain access to the communities they study to generate important insights that might be invisible to the insiders themselves (Duneier 1999; Blee 2002; Garot 2010).



When qualitative work involves interviews, the problem with hard-to-reach populations also spills over into questions of who should conduct the interviews and what the consequences of different interviewers may be. The debate is fairly extensive here, and the research conducted on these questions has not settled the debate. Nonetheless, there is by now ample evidence that, for some topics at least, the “match” between interviewers and participants matters, albeit for somewhat different reasons and in somewhat different ways (e.g., Schaeffers 1980; Blauner and Wellman 1998; Twine 2000; May 2014). For example, in a series of papers on the effects of the race of interviewers in survey studies with African Americans, Darren Davis has demonstrated that African American interviewees are negatively affected by White interviewers given pervasive distrust, increased racial consciousness, and the ever-present stereotype threat (Davis 1997a, 1997b; Davis and Silver 2003). As another example, in a study of how interviewers perceive skin color, Hill (2002) found that both White and Black interviewers report less nuanced skin tones for the respondents that are of a different race than themselves (White interviewers think Black respondents have darker skin tones than Black interviewers think, and Black interviewers think that White respondents have lighter skin tones than White interviewers think). As yet another example, Green and Linders (2016) found that the combination of racially homogeneous focus groups and race-matched facilitators produced somewhat different perceptions and understanding of racially charged comedy.

While the benefits of some form of insider status are by now widely acknowledged, they have not en-

tirely put to rest earlier concerns about the potential drawbacks of close researcher-researched relationships (Monti 1992). If the risk of “going native” has a somewhat old-fashioned ring to it, the recent controversy over Alice Goffman’s *On the Run* demonstrates that the issues captured by “going native” are still very much debated (Zussman 2016), even though, in this case, part of the problem, according to some of her critics, was that she was an outsider in the community she immersed herself in (White, middle class academic, writing about poor Black men). The risks associated with her outsider positionality, in other words, are those of exploitation, sensationalism, and stereotyping. Although the debate would no doubt have taken a different turn had Goffman been an insider in the community she studied, the potential “going native” problem would not necessarily have gone away. But, it would have been different, as the notion of “double vision” so clearly captures (Jacobs 2004; Einwohner 2011). Double vision, according to Janet Jacobs (2004:227), often “obscures the boundaries between the researcher and the researched” and it involves a “blurring of subjectivity that is intensified by bonds of gender and ethnic kinship.” Instead of viewing “double vision” as “a barrier to seeing clearly,” Rachel Einwohner argues that rather than partially obscuring what we see, such vision, because of its ethical underpinnings, can instead help us see more clearly. Einwohner (2011:428) calls this possibility “doubled vision.”

Taken together, then, there is considerable evidence from ethnographic work in support of the assumption that researchers who can claim some sort of insider status have advantages when it comes to

securing access to hard-to-reach populations. There is also evidence from interview studies that the quality of the data we gather with the help of research participants is impacted by the affinity between the researcher and the researched. In this paper, we join a group of scholars who are persuaded that some form of insider status is crucial for our ability to examine the lives of the hard-to-reach, but also alerts us to the ways in which insider status and/or social matching is not always sufficient to avoid potential problems with access, trust, ethics, and data quality (e.g., Irwin 2006; Chong 2008). Hence, regardless of the advantages or limitations of different sampling and recruitment techniques, the success of qualitative research on hard-to-reach populations is rooted in both the depth of the researchers' knowledge about the populations and the quality of the relationships that researchers develop with members of the communities they study.

But, this does not mean that questions regarding recruitment techniques are not important. On the contrary, they are critical for the issue at hand. That is, in order for a researcher's insider status to make a difference, he/she obviously needs to come close enough to potential subjects for them to know that he/she is trustworthy. It is for this reason that scholars typically rely on snowball sampling when they work with hard-to-reach populations. It is not because snowball sampling is objectively better than other methods, but instead because it is one of the few methods, perhaps the only one, that provides access. It is not surprising, therefore, that scholars have arrived at somewhat different conclusions regarding the effectiveness of the method. Some scholars describe snowball sampling as a strate-

gy which provides a comfortable environment for participants and promotes trust. Other researchers are concerned about the issues of representativeness that can arise if the snowball circulates only among people who are connected by similar lives, thus reducing the diversity of the sample (Arcury and Quandt 1999; Woodley and Lockard 2016).

Other established recruitment strategies include collaborating with local and indigenous organizations in an effort to overcome some of the barriers researchers face in accessing and working with hard-to-reach population. Such collaborations cover a wide range of approaches, including community-based participatory research, co-investigations with vulnerable population, and deep engagement with key informants (Benoit et al. 2005; Blakeslee et al. 2013; Ampt and Hickman 2015; Katigbak et al. 2015a). Yet other strategies for work with hard-to-reach research subjects involve creative use of social media as a point of access (Mainsah and Morrison 2012; Martinez et al. 2014).

In this paper, we draw on and extend these insights as we report on a research project that involves an extremely hard-to-reach population: first and second generation immigrant Muslim women in the United States. The study itself is an examination of how Muslim women in the Detroit area use public recreational spaces, like parks, walking trails, and bicycle paths. As an insider researcher with a seemingly straightforward and non-sensitive project, the first author had not initially anticipated any real difficulties with recruitment. But, soon after embarking on her study, she realized that her insider status was not enough to mitigate

a basic lack of trust, even suspicion, among the women she was interested in interviewing, thus confirming that insider researchers are almost always also outsiders in some ways. The strategy she devised to solve this problem was a form of community immersion that, over time, helped build trust and establish her as an insider member of the target community (Katigbak et al. 2015b; Matsuda, Brooks, and Beeber 2016). That is, for the present interview study with members of a religious minority group as participants, community immersion by an insider/outsider researcher proved the most effective strategy to not only recruit participants but also build trust and secure their commitment to the project.

In what follows, we first briefly describe the study population that prompted the methodological challenges we discuss in this paper and then discuss the immersion and recruitment strategies that helped us gain access and secure high quality data from participants who were committed to the success of the project.

## **A Study of Muslim Women**

Muslim women have long been portrayed as an oppressed group who face a plethora of social problems associated with their religious and gender identification (Bullock and Jafri 2000; Jackson 2010; Jaspal and Cinnirella 2010; Alsultany 2012; Eid 2014). The first author began the project with the assumption that, as a Muslim woman, she was enough of an insider to have no trouble with the recruitment process. During one year of pre-recruitment activities, her perspective gradually changed

and she came to appreciate the complexity of the notion of an insider-researcher. Her journey began with weekly visits to Dearborn, the city where the largest concentration of Arab Americans (mainly Muslims) in the United States live. As someone who was born in a Muslim country she had assumed it would be easy for her to establish relationships based on a common religious heritage, but quickly realized that Islam is practiced very differently in the Detroit Metro Area than in her native country of Iran.

In the very preliminary stages, it was therefore difficult for her to communicate with the Muslim community. This difficulty was also rooted in the socio-political situation of the Muslim community in the United States, which has long lived under a cloud of suspicion, and especially so after 9/11 (Curtis IV 2009). Although Muslims have a long history of peaceful contributions to life in North America, they quickly became “othered” as “Muslim-American” in the socio-political context after 9/11 (Tanvir Syed 2011; Mohamed 2016). As Muslims are among the most diverse of religious minorities, the term “Muslim-American” renders the extensive diversity within the Muslim community invisible (Sirin and Fine 2008). This diversity among Muslims in the United States comes from many sources, including their different countries of origin (even among Arab-Americans), incomparable cultural values, different sects of Islam, dissimilar approaches to gender relations, and varying connections with their countries of origin (Younis 2015). Misunderstandings about the Muslim community are not limited to the general public, but have also penetrated Western scholarship

about the Muslim world. For instance, the historian Samuel Huntington (2004) refers to Muslim immigrants in the West as the “Indigestible Minority.”

Muslim women in the Detroit Metro Area come from different sects in Islam, which directly or indirectly affect their interactions with the whole community. This paper draws on an interview study with a diverse group of 78 Muslim women living in the Detroit area of Michigan (mainly in Dearborn, Dearborn Heights, Detroit, Novi, Ann Arbor, Canton, and Farmington Hills).

### **The Importance of Being a Hijabi Researcher**

It was the first author’s personal experiences as an immigrant Muslim woman that inspired her to explore the ways Muslim women deal with the new cultural and social setting that is the United States and seek to determine the extent to which they live their lives at the margins of their new society or as integrated members of the larger community. Her Urban Planning background led her to mainly focus on how being a religious minority—Muslim women in this case—can affect one’s access to urban amenities. Her journey began with a personal contact with a Lebanese Muslim woman from the Detroit Metro Area. This initial encounter with the Muslim community revealed some of the challenges that Muslim women face when it comes to using public space and these early insights shaped the foundation of the study.

Being a hijabi researcher was the key to gaining initial access to the local Muslim community and attracting attention to the study. Besides wearing hijab,

two other factors played important roles in both the pre-recruitment phase and the actual recruitment of participants: first, the first author’s religious affiliation and, second, her country of origin. Wearing hijab made it possible for the first author to participate in numerous religious activities, communicate with key religious figures, and experience a Muslim woman’s daily life in the Detroit Metro Area. After the completion of a long pre-recruitment phase, data gathering started in July 2015 (mid-Ramadan, the Islamic holy month). During this month, Muslims fast from sunrise to sunset. Ramadan has three sacred nights called “Nights of Power,” during which Muslims stay awake the whole night and pray till the exact time when the sun rises. These nights are very important to Muslims which means attendance at the events at the local mosque was high, thus increasing our access to women in the community. The first author participated in prayers with other Muslim women while also providing them with a brief description of the study. Some women expressed interest in the study, although only a few contacted the first author after the events. The other factor that facilitated recruitment, the first author’s Iranian background, was somewhat more surprising. But, her recruitment experiences suggest that it helped attract many women to the study and also played a role in the trust-building process. This is so for two main reasons; first, Iranians belong to the same sect of Islam that the majority belong to in the Detroit area (Shia) and, second, Iran supports Middle Eastern people who come from and/or live in conflict zones, such as Lebanon, Syria, and Iraq. However, this same positionality also made it more difficult to recruit Muslim women from a few other countries (such as Egypt) (see: Figure 1).



**Figure 1. The first author as a hijabi researcher interviewing a Muslim women in a local public space.**



Those three nights of religious participation eased the first author's access to a wider circle of Muslim women by creating opportunities to connect to a group of young Muslim women. This first group introduced the first author to three local centers serving mainly young Muslim women where she met additional Muslim women. Other recruitment venues included public spaces (mosques, cafe shops, parks, trails, and libraries), non-governmental organizations, and interviewees' homes (family gatherings, individual meetings). Similar to other studies on Muslim women, the place where interviews were conducted was chosen by study participants based on their convenience and comfort (Ali 2013).

The interviews were semi-structured and focused on the women's experiences with social and public spaces. Participants narrated their stories as Muslim women and told stories about how they lived their lives in the United States. Some women shared their experiences of being identified as an "exotic other" (Tanvir Syed 2011) by both neighbors and strangers. Others talked about the "implicit bias" they face in everyday life by their non-Muslim neighbors (Cashin 2010). The implicit and explicit bias that Muslims face creates the foundation of a discriminatory social system (Hamdani 2005). In the case of this study, Muslim women's fear of discrimination made not only the recruitment process challenging but also the interviews themselves. In all interviews, and considering the advice of other researchers that dress matters (Talukdar and Linders 2012), the first author followed the Islamic dress code to show her respect for the study participants' values, as almost all study participants were covered. But, being a hijabi researcher involves more than dressing respectfully. It also means establishing sufficient trust to gather meaningful data. In what follows, we describe in greater detail the elements of the unfolding research process that, we think, can benefit other scholars who study hard-to-reach populations.

### Recruitment Steps

The misrepresentation of the Muslim community in the United States has influenced qualitative researches in two distinct ways. In some instances, it has encouraged Muslims to participate in research focusing on Muslims' social lives so as to present both Islam and themselves in a positive light (Tariq-Munir 2014). But, many other researchers

have had difficulties recruiting Muslims for qualitative projects (Williams and Vashi 2007; Mohammadi, Jones, and Evans 2008; Ryan, Kofman, and Aaron 2011). Daily experiences of micro-aggression have had macro-level consequences for life in Muslim communities, and have increased the social mistrust between minority and majority groups (Wing Sue et al. 2007; Wing Sue 2010; Shenoy-Packer 2015).

In the study we report on here, the recruitment process turned out to be more complicated than we had anticipated. This was so in large part because, as several of the Muslim women mentioned in the interviews, they believe that their community is under surveillance and tight security. This meant that the formal insider status that the first author represented as a Muslim-born woman, although it gave her initial access to the community, was not enough to gain the trust of potential participants.

This became evident when, initially, the first author tried to recruit women in public spaces, as the following excerpt from her field notes illustrate.

During a morning walk in a public park in East Dearborn, seven Muslim women expressed their interest to participate in the interview study. They are originally from Yemen and Iraq; four of them do not speak English, so I asked a local Arab teacher to help me to better communicate with them. Interviews went well for the few first questions; however, in the middle of the interview and for the questions on the public's image of Muslims, six of the women changed their mind and asked me to void their interviews. They ended their conversation with complaints about me trying to solve a problem which does not exist: "Everything

is great, we don't have any problem... Do you want to find a problem?"

Later on, one of the key informants explained that, given high levels of mistrust in the community, the women most likely were afraid that the first author was working with the Federal Bureau of Investigation (FBI), and hence could not be trusted with any information that signaled even the slightest opposition to life in the United States.

In order to establish trust with prospective interview subjects, an almost two and a half year long pre-recruitment process was completed in the form of community immersion. This long process of trust-building involved participation in almost twenty family ceremonies related to local Muslims; five major interfaith ceremonies (The Bridge, Islamic House of Wisdom, etc.); meetings and workshops related to Dearborn Health Initiative; ten Islamic ceremonies and fundraising events; and several lectures on the project in local mosques. In early 2013, the first author started to participate in local religious and cultural activities. She contacted several local religious and cultural organizations. Her familiarity with the Shia sect in Islam eased her access to Shia centers and after a few months, she was connected to other groups within the Muslim community (Mohebbi 2018). In late 2015, she initiated an eight-month interview study. At that moment, she had numerous connections with local key sectors and actors. The pre-recruitment process helped secure support from local leaders, and several put up flyers about the project on their social media pages and asked their members to participate. Without their help, the process of trust-building would likely have ended



in failure, and without community immersion it is unlikely that any of the local groups and organizations would have supported the project. The first author also contacted persons who were related to groups with different political orientations related

to Middle East issues in order to gain a wider range of participants with different levels of attachment to American identity. This lengthy recruitment process was a means to establish trustworthiness in the eyes of members of the local Muslim community.

Graph 1. Major goals and strategies in pre-recruitment process.



Source: Self-elaboration.

### Social Media: A Pivotal Means to Recruit Muslim Women

The term “social media” captures a plethora of internet-based services that create a platform for online exchange of data and communication with distinct social groups. As such, it is a useful tool by which to interact with a wide range of groups from governmental sectors to grassroots organizations. Qualitative researchers have utilized numerous aspects of social media (Dewing 2010; Evans-Cowley and

Hollander 2010; Hallam 2013). Of particular interest here is the use of social media to dig into unknown and hidden dimensions of a community and build trust with potential study participants (Cain 2011; Eytan et al. 2011; Afzalan and Muller 2014; Weslowski 2014; Afzalan and Evans-Cowley 2015).

The dynamism of social media makes it possible for researchers to gain insights into the complexities of a community and also to encourage public engagement (Evans-Cowley and Hollander 2010;

Hallam 2013). In the context of this study, social media helped provide potential study participants with background information about the interview study. It also gave them an opportunity to communicate with each other and the researcher about the research topic through online group discussion and one-on-one Q and A conversations. In this sense, the use of social media accelerated the process of trust-building with potential study participants, as other studies too have observed (Safko and Brake 2009; Calefato, Lanubile, and Novielli 2016).

For instance, conversations with Muslim women about their urban accessibility issues, which was the broad focus of the research project, began in a Facebook group. The first author used the same language as the other group members and referred to Quran and Haidth (religious scripture of Shia) to suggest that Muslim women can have an active lifestyle, and walk or bike in public spaces designated for such activities. In the pre-recruitment phase, a wide variety of virtual platforms were utilized, such as Facebook, Twitter, and Instagram. Those were primarily used as tools to interact with Muslim women and identify different religious groups and cultural distinctions within the Muslim community. The first twenty participants were recruited via a Facebook group of Muslim women. The activities of this group are focused on spreading Islamic values by sharing Muslim women's everyday spiritual experiences. Those virtual conversations led to face-to-face meetings with a handful of Muslim women who later served as informants for the study. Interviews were first conducted with Lebanese Shia women and then with Syrian, Pakistani, Hindi, Iraqi, Yemeni, and Iranian women. Through

social media, the first author was invited to numerous local ceremonies by a wide range of social media groups and community leaders. Mid-Sha'baan and Nights of Power ceremonies were among the most significant Islamic ceremonies that effectively expanded the study network.

## Recruitment Barriers

This study benefited from an innovative sampling and recruitment method and gatekeeper strategy (Goodman 2011). As we have already discussed, in order to start the recruitment process, it was essential to make cultural connections with community members and find the right gatekeepers to secure a diverse group of participants (Read and Bartkowski 2000; Shirazi and Mishra 2010; Siraj 2012). Based on the first author's familiarity with Shia Islam and the fact that the vast majority of the target population are Shia, the recruitment efforts started with a Shia group and then extended to Sunni groups. The first author started with social media and later on she set up face-to-face appointments with Muslim women in the Detroit Metro Area.

The study flyer, delivered to potential study participants and gatekeepers, emphasized the absence of Muslim women among the key players in local and regional planning projects related to urban accessibility. It was meant as an important step towards encouraging Muslim women to start articulating and expressing what they need in case of urban accessibility. And most of the Muslim women we talked to gave the impression that they cared deeply about the study subject, thus facilitating the recruitment process.

Not altogether surprisingly, the groups we struggled the most to recruit were Muslim women who could not speak English and poor Muslim women. These groups mainly lived in isolated urban neighborhoods where Muslims are in the majority. The above mentioned factors along with the first author's position as a non-local, well-educated, English-speaking woman made it necessary to locate proper gatekeepers who could help us gain access to these groups of women. One of the major gatekeepers was the *Arab Community Center for Economic and Social Services (ACCESS)*, the most influential local non-governmental organization focusing on Arab American social and health issues. The director of the organization, Mona Makki, introduced the first author to the staff, who helped ease her access to the customers of the center, the vast majority of whom are fairly recent Muslim immigrants or refugees from the Middle East. The first author had permission to talk to Muslim women in the lobby area and

ask them if they were interested in participating in the interview study. Additional women were also recruited by ACCESS staff. As most ACCESS clients are poor and/or do not speak English, this gatekeeper greatly facilitated the recruitment of women with these experiences. This group of study participants also included recently arrived Middle Eastern Arab refugees. Two main reasons were mentioned by participants as the primary motivations for them to agree to be a part of the study: their level of trust in ACCESS and the effectiveness of ACCESS in promoting their life quality. They mainly saw this study as a motor for change in their community. ACCESS was only one of numerous local organizations that eased access to the Muslim community during the pre-recruitment and recruitment phases. In order to better illustrate the different recruitment strategies used for this study, below we briefly relate three recruitment stories that capture some of the key points we have made in this paper (see also Table 1).

**Table 1. Selected pre-recruitment research procedure.**

Pre-recruitment Research Procedure	Definition and Purpose	Process
<b>Active Participation in Religious Ceremonies</b>	A process of facilitation that was utilized to ease access to the Muslim community and help build trust with Muslim women	<ul style="list-style-type: none"> <li>- Identify Muslim women's social and religious values</li> <li>- Understand Muslim women's social experiences</li> <li>- Communicate with participants in their own language</li> <li>- Find mediators from the Muslim community who can facilitate communication with community members and leaders</li> </ul>
<b>Identify Gatekeepers</b>	Individuals or organizations that are trusted by Muslim women and can validate the trustworthiness of the researcher	Establish relationships with a range of local community leaders (from local religious leaders to influential community members and local key figures) to ensure diversity among the participants
<b>Participant Observation in Interfaith Activities</b>	A process of trust-building between the researcher and community members while observing intergroup relationships among religious minority members and the rest of the community	<ul style="list-style-type: none"> <li>- Phase I: Understand the importance and necessity of interfaith activities through social media discussions</li> <li>- Phase II: Identify key local leaders for interfaith events</li> <li>- Phase III: Participate in interfaith ceremonies to understand how relationships between Muslims and non-Muslims are built</li> </ul>
<b>Individual Discussions with Muslim Women</b>	Trust-building at the personal level to lessen the caution that characterized the initial responses by Muslim women to the study	A micro-level trust-building strategy to provide the researcher with an in-depth understanding of Muslim women's varied social experiences

Source: Self-elaboration.

## Recruitment Stories

*Story of Recruitment in a Public Park:* It started in a local park in a majority Muslim neighborhood in East Dearborn (Ford Woods Park). Recruiting and interviewing in public parks had initially seemed like a good idea, but soon turned into a challenge. It was during an interview with a Yemeni woman sitting on a bench beside the pool that the difficulties of this strategy first became clear. Kids were playing in the pool and mothers were walking and chatting under a tree in the middle of the park. In the middle of the interview, a basketball hit the first author and it caused a temporary problem for her. This incident helped us decipher some of the hidden cultural and social factors, in this case, kin/ethnic social support, that can impede interviews. Similar studies on minority groups have also found that acculturation and “ethnic social support” can work as a defensive reaction by minorities against racial/ethnic discrimination (Noh and Kaspar 2003). In this study, the interviewed woman knew the man who hit the first author with a basketball, but she did not say his name most likely to prevent any repercussion for one of her people. It depicted a new image of a close-knit Muslim community where neighbors defend neighbors against the possibility of sanctions. Another woman, Kamalah from West Africa, had agreed to be interviewed when the first author asked her in the park, but changed her mind a few questions into the interview. Much later, when the first author was more immersed in the field, they met again in the mosque, and this time Kamalah decided she wanted to participate. Such incidents point to the importance of community immersion as a key element in trust-building.

*Story of Recruitment at Religious Centers:* The first author gave a lecture in one of the local conservative mosques (conservative centers in this study refer to religious centers in which Muslims are encouraged indirectly to celebrate their religious identity over national identity) during the festivities surrounding the three Nights of Power. During the pre-recruitment process, she made connections with local Muslim activists, and one of those connections was an Arab man who was actively engaged in the empowerment of the Muslim community in the Detroit Metro Area. He encouraged the first author to participate in the three night ceremonies and asked her to give a lecture and talk about the project and its extended benefits for the whole community. The first author gave a 20-minute talk to Muslim men and women while introducing herself and her connections with the University of Michigan. Talking directly to Muslim men and women was a great opportunity to introduce the study and briefly describe its potential benefits for the whole community. As men play a pivotal role in Islamic families, their presence and acceptance of the study would encourage more Muslim women to consider participating. Talking about the study in a religious center also helped build trust between the researcher and community members. Moreover, being a hijabi researcher and working as a visiting scholar at a local prestigious university encouraged Muslim women to consider the first author as a trustworthy researcher. Study participants mentioned the University of Michigan as a respectful and credible academic sector in the eyes of the Muslim community.

On one occasion at the center she participated in a Shia mourning ceremony for Imam Hossein (third

sacred figure in Shia sect). It was held in one of the major Shia religious centers in the area. She tried to celebrate this sacred month with local Muslims to express her respect for their values. Accepting responsibilities in these ceremonies and showing the locals that she is a member of the community, put her closer to an insider's position. She tried to be "with" the potential study participants as much as she could, which meant simultaneously playing the role of insider and outsider (Hall 1990; Aoki 1996). While at the center, several women approached the first author about her research and pressed her on how it might benefit the Muslim community. In so doing, they also more or less subtly tried to educate the first author about some of the challenges they experienced as Muslim women living in the Detroit area. A young woman from Iran, Sarah, for example, described her discomfort with the external American world; she said:

I don't like to go shopping for a bunch of reasons, for example, the music there disturbs me and makes me feel uncomfortable. Also, the photos and advertisement make me feel uncomfortable, specifically when I'm with my [kids]...I can be a college professor too because of my degree, but I don't feel comfortable because boys and girls sit in a class. I prefer to teach girls.

Thus, being situated somewhere closer to an insider position broadened her understanding of the diversity among women in the Detroit area Muslim communities (Dwyer and Buckle 2009), and also made it possible for the women to share aspects of their lives that they had been unwilling to divulge before they had developed trust for the first author. And yet, getting closer to an insider's view was not an

easily achieved goal, despite the fact that the first author in many ways began the study as an "insider" in the way qualitative scholars often talk about the term—a Muslim woman, studying other Muslim women. Instead, the first author spent more than two years interacting with the community, to the extent that Muslim women started calling her a "Dearborn Lady."

*Story of Recruitment at Interviewees' Home and Beyond:* During Ramadan 2015, an Iranian Muslim family had an *Iftar* gathering with friends and family members. This gathering included the first author, who had met them in a local mosque during the pre-recruitment process in early 2014. *Iftar* is the evening meal when Muslims end their daily Ramadan fast at sunset, and the fact that they invited the first author to join them demonstrates that they had come to completely trust her and also support her research. In a meeting with the researcher, they mentioned the study subject as a critical concern of Muslim women in the Detroit Metro Area. This belief encouraged them to take responsibility for the study and help recruit participants. The first author interviewed three Muslim women in this home and another five interview appointments were set up during one of those parties.

It was not surprising to the first author that Iranian Muslim women wear the hijab for different reasons, including pleasing God and respecting family tradition. The women in the family who invited the first author into their home were among the Muslims who accept hijab as a family tradition. This is in contrast to other participants, like the Lebanese Muslim women, who were religiously committed to



the hijab. For instance, one of the Lebanese participants left Dubai because as a hijabi, she could not find work related to her expertise. She said, “I am stuck in Dearborn because I want to keep my hijab.”

Furthermore, the first author’s active participations in local events helped her being accepted by the community. In official meetings and events, she wore hijab to respect the Muslim community, but during many unofficial occasions and in her personal life, she was not covered. At first glance, this might seem to undermine the researcher’s claims to authenticity, but interestingly it did not challenge her credibility. On the contrary, most study participants appreciated the gesture as a sign of respect for the Muslim community and it encouraged them to articulate their own experiences with the hijab. Kamalah, for example, offered the following analysis of how non-Muslims interpret the hijab:

I think my hijab can either be something that’s very defensive for people, they might be defensive about it because of the media and how the media portrays Muslim women; or it could come like the sense of “Oh, she is oppressed” or “Oh, she is not educated.” Because of the unfortunate...the stereotypes that are associated with hijab. Yeah, I think people frequently do have this notion, so as soon as they see me in hijab, they assume I am an extremist, but I’m really not those kind[s] of things.

Taken together, these varied recruitment experiences show that, for studies involving religious minority groups and other hard-to-reach populations, it is not enough to be a “formal” insider (defined by major social categories), which otherwise is the most common solution to the problem. Rather, in order

to secure high quality data, you must also immerse yourself in the community, a tactic borrowed from ethnography and participatory action research, but for very different reasons.

## Conclusion

In this paper, we have reflected on our evolving strategy of using community immersion in an interview study with Muslim women in the Detroit Metro Area and the importance of trust-building processes to secure interview data. We draw three main conclusions from the study. The first conclusion is related to the extent to which community immersion can ease access to hard-to-reach participants in interview studies. In this research, the first author used participant observation as a tool to immerse herself in the community. Community immersion is not usually used in interview studies, but our experiences demonstrate the significant role community immersion can play in research that targets hard-to-reach populations and/or addresses sensitive issues. Community immersion is an effective strategy to identify gatekeepers and ease communication with religious minority groups. Two main characteristics of the target population could not have been properly understood without community immersion: first, the religious diversity among Muslim women and, second, the social barriers Muslim women face in their daily lives. Without the pre-recruitment process and community immersion, in other words, the study would have failed to capture the full range of experiences that characterize women in the Muslim community.

The second conclusion relates to the role of social media in the pre-recruitment process. In the pres-

ent study, social media, more specifically, Facebook, played a pivotal role in exploring the meaning of community for the target group. The use of social media in this study, then, gave invaluable insights into the Muslim community in the Detroit Metro Area. Many of the face-to-face interactions and communications were initiated through social media activities in open or private social/religious Facebook groups. Social media also provided opportunities to get involved in virtual religious/social activities, including, especially, interfaith activities. Face-to-face interactions among people affiliated with distinct religious identities require specific communication skills and mindset, which make real life connections less productive for underrepresented populations, specifically minorities with limited language skills. This barrier was overcome by using social media as a platform to maximize participation. In this study, the first author's ability to communicate in Arabic made it easier to understand the target group's values. Moreover, the majority of Facebook groups that the first author actively participated in were religious groups devoted to discussing spiritual experiences. The first author's familiarity with local religious vocabulary and values was another influential factor that helped her find common ground with the target group.

Lastly, although the first author was born and raised among Muslims and understands their values, her fellow Arab participant-assistants were influential both in trust-building and data collection. For uncountable time-sensitive reasons (recent hate crimes, terrorist acts, tight security, and presidential election debates), plus the above-mentioned concerns, the trust-building process was intense and

time-consuming. And yet, we still had some difficulties recruiting Muslim women who were further marginalized by poverty and language difficulties. When the first author started the pre-recruitment process, she was known as an Iranian Shia woman; this title gave her enough credibility to effectively communicate with Muslim women and participate in Islamic events. Considering the fact that there are differences between the Persian and Arabic Islamic cultures, she communicated with local Muslim women on a daily basis to better understand their social values and priorities. These constant interactions helped her develop a deeper insider perspective than her formal category membership—a Muslim woman—would allow her.

The latter point is perhaps the most critical lesson for any researcher who works with religious minorities, specifically Muslims. Muslim minorities in the Detroit Metro Area, like other Muslims in Western countries, are fearful of misrepresentation in scholarly publication and public media alike. To overcome this fear and create a research environment that inspires trust, researchers must be self-conscious about their positionality and do what is necessary to gain an insider's perspective and develop sufficient trust through community immersion to overcome the caution and wariness that characterize this community.

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## **A Big Win in Smalltown: Demanding Dignity in an Era of Neoliberal Austerity**

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**Abstract** This article explores the concepts of dignity at work and worker voice in the public workplace during a period of surging neoliberal austerity intended to reduce taxes, government regulations, and public services. I ask how the changing landscape of public employment in the neoliberal era has created new and exacerbated existing threats to dignity at work and how workers have responded to such threats. The question is answered by exploring how and why an unlikely group of workers in Smalltown chose to use their collective voice on the job to organize a union. Using ethnographic methods, I am able to look at the strategies of public workers coping with a changing work environment in real time. The case of Smalltown offers a window into the interplay of the global and the local by examining how macro-level neoliberal forces can shape workers' micro-level responses to attacks on their dignity at work. The findings reveal how neoliberal attacks on public workers in particular settings can trigger collective responses that confront not merely austerity but other threats to dignity as well. This study informs our understanding of dignity at work and worker resistance in the post-Great Recession economy.

**Keywords** Neoliberalism; Dignity at Work; Worker's Voice; Austerity; Public Sector Unionism

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It was a brisk Saturday morning in the winter of 2011 in Smalltown, New England. Piles of dirty snow along the edge of the streets served as a reminder of the recent storm, as well as the work performed by public workers to keep the roads cleared. As I drove through the center of town, I passed a row of old colonial homes, a large white congregational church, and a cemetery—iconic landmarks in countless New England towns, many of which pre-date the Revolutionary War. As I slowed to a stop at the intersection beside the town green, I noticed a Tea Party Patriot

sticker on the back of the pick-up truck in front of me. I had seen a few “Don’t Tread on Me” flags in front of homes along the way to town as well. These symbols conjured up memories of the recent Great Recession. As with many cities and towns in America, Smalltown was devastated by the Recession. Home values plummeted, jobs were lost, foreclosures skyrocketed, and many residents blamed the government and elected officials for the economic downturn.

According to economists, the economy had formally recovered by 2011 (NBER 2010). Despite this recovery, the state’s unemployment rate hovered around 9%, and the Recession felt far from over for Smalltown. Like so many other Americans, Smalltown’s residents felt they were sold out while large banks and financial institutions deemed “too big to fail” were bailed out with taxpayer dollars. This anger manifested itself in two distinct movements at the time: the Occupy Wall Street movement and the Tea Party movement (Skocpol and Williamson 2012; Braunstein 2014). Occupy took the position that the major banks, financiers, and Wall Street were to blame for the Recession and that the government needed to intervene to bail out ordinary citizens. Alternatively, the Tea Party blamed the government and rejected the idea of taxpayer bailouts of any sort. While Occupy Wall Street encampments sprang up in large and small cities across the U.S. and appealed to a young and diverse group of protestors, the Tea Party movement thrived in more rural areas, like Smalltown, and appealed overwhelmingly to older white males (Parker and Barreto 2014).

The Occupy movement, which was largely swept from public spaces by local police departments, be-

came fragmented and transformed into different modalities, but the Tea Party movement went on to run electoral campaigns funded by wealthy donors such as the Koch Brothers. In 2010, Tea Party candidates won numerous seats in state legislatures, as well as 48 seats in the U.S. House of Representatives and four seats in the U.S. Senate. The Tea Party platform codified a neoliberal faith in unfettered free markets which believed that any collective attempts to fix economic problems would only make things worse. For Tea Party adherents, austerity measures which reduced the influence of government were the key to restoring a vibrant economy.

As the truck in front of me drove off with a loud rumble and a puff of black smoke, my GPS directed me to make a left turn into the parking lot for the Smalltown public office buildings. I parked my car under a large, leafless oak tree in the mostly empty lot. I zipped up my coat before stepping out into the winter air. Across the parking lot stood my destination, an old Colonial-style building characterized by flaking white paint on the long wooden clapboards that ran horizontally around the structure. On the stairs leading up to the entrance of the building was a group of women, sipping coffee and speaking in hushed tones. These were some of the public employees who worked inside the building during the week, and they were the reason I had come to Smalltown this Saturday morning. Bundled in coats and scarves, they stood under a green sign above the doorway that read in faded gold letters “Smalltown Town Hall.”

As I approached the group, I overheard them discussing comments made recently by the town’s First

Selectman—the New England equivalent of a mayor—on the local AM radio station about the need to reduce taxes and cut spending in Smalltown. He even went so far as to discuss reducing positions. The group was clearly worried about the prospects of their jobs being eliminated, but rather than expressing fear, the conversation alternated between anger and dark humor—perhaps the best coping mechanisms when faced with such uncertainties. “He’s no leader. He’s a farmer. And not a very good one at that!” said Jessica, the Assistant Town Clerk, to the laughter of the others congregated at the entrance. Altogether, there were eight white-collar workers employed at the Smalltown Town Hall—seven women and one man, all white and ranging from 40-65 years in age. These employees were at the town hall on their day off because they had just voted to form a union and now it was time to sit down with their bosses, the town’s Board of Selectmen, and negotiate their first contract. I came to join them in this process to learn more about why they chose to organize a union.

The group of workers was comprised of Karen, the Town Clerk, who was a very outspoken champion for the union and spoke passionately about the stability that a union contract could offer them; Melody, the Secretary to the First Selectman and first President of the new union, an outspoken advocate who was not afraid to openly confront management during negotiations; Jessica, the Assistant Town Clerk, an animated storyteller; Dave, the mellow-tempered Fire Marshall, the only man in the group; Grace, the Tax Collector, who was generally quiet, but always conveyed a sense of annoyance with the actions of the Board of Selectmen; Maureen, the Assistant Tax

Collector, whose job was most commonly threatened by budget cuts; Janet, the Director of Youth and Social Services and Secretary of the new union; and Beverly, the Assessor and Treasurer of the new union. Karen, Melody, Jessica, and Dave along with Tom, a representative from the national union, made up the union’s bargaining team which sat down regularly with the town’s Board of Selectmen over 18 months to negotiate the first union contract.

The Board of Selectmen—a somewhat antiquated and arcane, yet typical form of government in New England towns—was comprised of the First Selectman, Arthur, who was a Republican, and four additional Selectmen, Stanley, John, Phil, and Norm—all men. The Smalltown town charter, dating back to the 1700s, mandates minority political representation on the board, which translates into two Democrats and two Republicans with the First Selectman being the tie-breaker and the executive leader of the town. Only the First Selectman is a paid position; the other Selectmen serve on a voluntary basis. Town policy decisions are handled by the entire board, but the First Selectman serves as the immediate supervisor for the town employees on a day-to-day basis.<sup>1</sup> All of the Board of Selectmen positions are up for election every two years, making for an unusual employment arrangement for the town employees who generally outlast their bosses on the job and provide continuity in the town offices.

In addition to the town hall workers, several blue-collar workers were also employed by Small-

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<sup>1</sup> This is in contrast to the Town Manager form of government in which a professional manager is hired to manage the town workforce.

town—they worked on the town road crew and for the parks department, doing a variety of maintenance work. Unlike the town hall workers, the maintenance workers were exclusively men and they had an easy, jocular relationship with the Selectmen. Like the town hall workers and the Selectmen, the maintenance workers were all white—an unsurprising fact considering the general lack of diversity in Smalltown and its neighboring towns.

The maintenance workers, like the blue-collar employees of most other towns surrounding Smalltown, have been unionized for decades. Smalltown's home state passed a law in the early 1970s that allowed public workers to form unions in order to bargain collectively over wages, hours, and working conditions.<sup>2</sup> By the early 1980s, the percent of public employees who belonged to unions skyrocketed to over 50% in the state. Despite the surge in unionization, the Smalltown town hall employees, like in most other small, white-collar workplaces, never elected to form a union. In 2011, the national rate of unionization for public utility, sanitation, and maintenance workers was 40%, more than double that for legislative office workers who were just 14% organized (Hirsch and Macpherson 2017). In general, women have also been less likely to be unionized than men, although the gap has closed significantly in recent decades due to the disappearance of typically male-occupied manufacturing jobs and the rise of unionization in the female-dominated teaching occupation (Bureau of Labor Statistics<sup>3</sup>). Workers in small workplaces such as the Smalltown town hall

are also less likely to unionize due to the close proximity of management and often personal nature of relations with managers (Even and Macpherson 1990). Thus, in this study, I ask the question: “Why did the town hall workers of Smalltown decide to use their voice and organize a union in the most unlikely of places, a small, white-collar, predominantly female workplace during a time when taxpayers and voters were angry with the government?”

Studying the unionization of Smalltown's public workers is important for two reasons. First, the ongoing expansion of neoliberal ideology, in particular in response to the Great Recession, provides an opportunity to observe the coping strategies of public workers in real time, at the local level, to macro-level political economic forces. Second, the case of Smalltown enables an investigation of two important issues in the sociology of work: dignity at work (Hodson 2001) and workers' voice (Wilkinson et al. 2014). As defined by Hodson (2001:3), dignity is “the ability to establish a sense of self-worth and self-respect and to appreciate the respect of others.” Freeman and Medoff (1984:8) refer to workers' voice as “the use of communication to bring actual and desired conditions closer together.” In industrial economies, they note, unions are the prime vehicle for collective voice.

In the rest of this article, I explore the concepts of dignity at work and worker voice, then describe the challenges to dignity faced by the Smalltown workers while on the job; the triple threat of managerial turnover, gender discrimination, and neoliberal austerity. I also analyze the structural features of the workplace to determine what characteristics, if

<sup>2</sup> The first state to pass a statute allowing public workers to engage in collective bargaining was Wisconsin in 1959.

<sup>3</sup> See: <https://www.bls.gov/opub/>. Retrieved June 14, 2018.

any, contributed to the use of collective voice by this group of workers. Finally, I demonstrate that while neoliberalization and its related political discourse of austerity poses tremendous challenges to public sector workers, it can also serve as a catalyst for workers to stand up and fight back. That is, “budget-cut fever” is a real threat to workers’ livelihoods, but the collective response of workers’ to this threat can open doors to challenge a broad array of attacks on their dignity at work.

### **Dignity and Voice in the Neoliberal Era**

The current political-economic period is commonly referred to by sociologists as “the neoliberal era.” Stemming from the economic crises of the 1970s, the neoliberal era is generally acknowledged to have begun with the election of Ronald Reagan in 1980 who, in his inaugural address, proclaimed that “government is not the solution to our problem; government *is* the problem.” While neoliberalism is not a monolithic process, it has at its core a reinterpretation of classical economics which argues that unfettered free market capitalism is the best economic model for generating economic growth which will create the best outcomes for all members of society (Hayek 1948; Friedman and Friedman 1980; Harvey 2005; Fourcade and Healy 2007 ). At the macro-economic level, this is accomplished by a combination of austerity measures including reductions in taxes and government spending, deregulation, and privatization (Vachon, Wallace, and Hyde 2016). At the workplace level, it means increased ability of managers to hire and fire workers as needed and to reward them on an individual and competitive rather than collective bases (Romer 1986; Cappelli 1999).

Despite numerous theoretical and empirical writings, sociologists have surprisingly not delved deeply into the ramifications of neoliberalism as a political project for worker dignity in the public sector. Unlike the private sector where employment is determined by the ebb and flow of the labor market, public sector employment is largely regulated by public policy and thus is highly susceptible to the political agenda of elected officials (Johnston 1994). In what follows, I will briefly review the established predictors of dignity at work, explore the role neoliberalism may play in undermining dignity, and consider ways in which workers can respond when faced with threats to their dignity at work. These theoretical insights will help to inform our understanding of the experiences of the workers in Smalltown.

### **Dignity at Work**

In his comprehensive treatment of dignity at work, Hodson (2001) identified several key factors that reinforce or undermine dignity at work. On the one hand, good management and well-run organizations are key predictors of a meaningful and satisfying work life. On the other hand, mismanagement and abuse, overwork, challenges to autonomy, contradictions of employee involvement, and gender disparities are key threats to dignity. On gender, Hodson found women to be more likely to be employed in disorganized, chaotic workplaces. With regard to mismanagement, he found managerial abuse to be more common in smaller workplaces where employees worked under direct supervision or in close proximity to the boss (see also Edwards 1979).



The injection of neoliberal values into the daily work practices of organizations has likely exacerbated old and created new challenges to dignity at work. The singular emphasis on market processes within the workplace, including the use of authority unrestricted by government regulations or union contracts, can create workplaces devoid of basic dignity for employees (Hodson and Roscigno 2004). A growing number of sociologists have pointed to the negative consequences of neoliberalization for employee well-being, including the work of Crowley and Hodson (2014) which found increases in employee turnover and reductions in informal peer training, effort, and job quality to be associated with neoliberal work environments. A more recent attack on dignity at work during the neoliberal era and one not treated in Hodson's original work is the decline of job security and the rise of precarious work. Kalleberg (2009) finds the increase of precarious work, characterized by irregular work schedules, short-term employment, or a constant fear of layoffs, represents a serious threat to workers' dignity. Within the public sector, neoliberal austerity has led to increased precarity and perceptions of insecurity for workers who continually ponder whether their jobs will be eliminated by budget cuts.

### Responding to Attacks on Dignity

Hirschman's (1970) theory of individual and group responses to dissatisfaction in organizations outlines three possible responses of workers faced with attacks on their dignity. Dissatisfied group members may choose *exit*, which entails quitting the organization; they may choose to use their *voice* to affect change in the organization; or they may choose to

just remain *loyal* despite their displeasure. Employment situations represent a special case because of the power imbalance that exists between employer and employee (Hamilton and Feenstra 1997). That is, workers can in principal quit their jobs, but the limited prospects for reemployment make exit a somewhat false option for workers who need a stable source of income. Because of fear of reprisal, most employees grudgingly opt for loyalty which is why it is so extraordinary when workers choose voice—even more so during hard economic times when re-employment options are even more limited.

When considering responses to attacks on dignity at work, the use of voice corresponds with Hodson's (2001) concept of resistance, which he identifies as one of the key ways in which workers can safeguard dignity at work. Resistance can take various forms, ranging from the deliberate sabotage and destruction of equipment (Juravich 1985) to more subtle and subdued actions such as withdrawing cooperation or withholding enthusiasm. One key question that arises when looking more closely at voice as a form of resistance is whether it is individual or collective in nature. Individual voice can often be more subtle than collective voice, but it is inherently riskier as the cost for an employer of terminating one unruly employee is relatively small compared to the cost of trying to replace an entire workgroup that is acting in solidarity (Fantasia 1988).

Considering the neoliberal threats to dignity described above, there are theoretical reasons to expect workers to choose exit, but also some reasons to expect the use of collective voice. On the one hand, the market ideology characteristic of neoliberalism



creates a tendency for workers to individualize social problems and pursue the typical market solution—exit for a better alternative (Wright and Rogers 2011). On the other hand, the seemingly arbitrary assault of neoliberal austerity on a group of workers could create a collective sense of decline within the place of employment, potentially galvanizing resistance into the use of collective voice to protect dignity at work—especially when options for exit are limited.

The case of Smalltown provides a great deal of insight into the threats to dignity and responses to such threats by public sector workers in the era of neoliberalism. The municipal site of employment represents a very local manifestation of neoliberal austerity, often experienced by workers as personal attacks on their dignity. Smalltown offers a window into how neoliberalism, dignity at work, and workers' voice intersect in the lived experiences of workers at the local level. Some of the threats to dignity encountered by the town hall workers are typical and well-documented, and many may not necessarily be new, but have not been afforded much consideration in previous research. In what follows, the story of Smalltown will be placed into perspective by considering previous research and theory in an attempt to glean new insights into the micro-macro connections between neoliberal hegemony and the daily work-life experiences of workers, including their propensity to resist threats to dignity.

## Research Design and Methods

This study takes place in Smalltown, a fictional name used for a real New England town. Smalltown

is a historic, mostly rural setting that is best known for its annual agricultural fair each summer. There are less than 3,000 households, and the population is over 90% white. The median family income for Smalltown is in line with the median for the state. I selected Smalltown as the research site for this study as a result of my grounded approach while conducting a study of union democracy. Travelling to union meetings throughout the state and observing the democratic process of local unions brought me into frequent contact with a union representative named Tom, who I befriended, and who invited me to the first contract bargaining meeting for the newly unionized Smalltown town hall workers. Since forming a new union is a rare phenomenon in recent years—especially in a small workplace comprised almost exclusively of women workers—the opportunity to observe the negotiation of a first contract seemed like an excellent opportunity to study democratic practices in a newly formed organization. What I found, however, was that the motivations of these workers for organizing a union were very interesting, thus the focus of the study shifted in response to the circumstances.

I utilize a qualitative research design that incorporates direct observation with in-depth interviews. Direct observation data were gathered at union meetings and contract negotiations between 2011 and 2013. The negotiations were held at public buildings and were attended by the workers, their union representative, management, and their attorney. Contract negotiations provide an excellent opportunity to gain insight into the underlying motivations for these workers in choosing to use their voice on the job. The proposals put forth by the workers

during negotiations outlined their perceptions of the sources of decline in their workplace.

I conducted semi-structured, in-depth interviews with each of the eight town hall employees described earlier and two key informants: the union representative, Tom, and Rachel, a union organizer who helped the group form their union. Being a native of the state who grew up in a working class community of similar size to Smalltown enabled me to forge strong connections with participants over the course of the project. The town management, described earlier, was not interviewed for this study, since the focus was on the experiences and motivations of the workers. The interview guide consisted of open-ended questions on two broad topics: general workplace experiences and motivations for organizing the union. In response to a recurring theme in the observational data, I also focused on the relationship between macro-level political-economic processes and micro-level responses to the changing terrain of public sector employment during the period of neoliberal austerity. The interviews were between one and two hours in length and were conducted outside of work, often in a local coffee shop. All interviews were recorded and transcribed verbatim for the analysis. Pseudonyms were used to protect the identity of participants.

All participant observation and interview data were coded into general themes, following Glaser and Strauss's (1967) grounded theory approach. The sociological theories of dignity and voice were used as "sensitizing concepts" (Schwartz and Jacobs 1979) to organize the data. The conclusions for this study were reached through the simultaneous process-

es of collecting and coding the data, and then going back to the field to further explore those codes; that is, the conclusions were achieved inductively through theoretical sampling.

## The Triple Threat to Dignity in Smalltown

It doesn't matter who you are or where you work in this office—you're a nobody. You're just a warm body. Twenty-five years of public service, and they [the Selectmen] don't care or appreciate it. [Beverly, the Assessor of Smalltown]

As the quote by Beverly above suggests, the town hall workers in Smalltown felt they were not respected by management. The nature and form of disrespect varied across occasions and across individual workers, which lead me to probe more deeply and ultimately identify three major themes which I refer to collectively as the triple threat to workers' dignity in Smalltown. The themes that emerged were: 1) frequent managerial turnover, 2) persistent gender discrimination, and 3) neoliberal austerity. Each of these themes will be discussed in detail below.

### The Chaos of Frequent Managerial Turnover

The employer-employee relationship in New England municipal government differs from the relationship found in most private sector workplaces and even public sector jobs in other parts of the country. Management, in the form of the Board of Selectmen, is replaced frequently—on a quasi-regular schedule depending upon election results—and employees almost always have greater tenure than

their bosses. Smalltown holds elections every two years, which means theoretically the entire management team could be replaced every two years. The town hall workers on average have 15 years of experience in their jobs, ranging from Melody, the Executive Secretary, who is the youngest and least senior with nine years of experience up to Karen, the Town Clerk, who has 25 years on the job. On the other hand, the Selectmen averaged less than six years on the job.<sup>4</sup>

The two-year election cycle in towns like Smalltown creates an unpredictable fluctuation in management that contrasts sharply with the relative stability of the staff who perform the day-to-day functions of municipal government. They carry their job skills and institutional knowledge forward through periods of disruption caused by management turnover. The following insight from Grace, the Tax Collector, illustrates the nature of this system and how it negatively impacts the town hall workers:

It's an archaic system. You can't have new Selectman come in every two years to run a town. You need continuity, someone who knows how to manage. I mean, God bless him [the First Selectman], but he's a farmer. I'm sorry, but my point is anybody can get voted in. It doesn't matter if you have any real knowledge, managerial skills, or the best interest of the town in mind. If you are willing to run because nobody else wants it, you get in. That, for the employee, is a horrible situ-

ation to work under. And I'm sure that's part of everyone's feeling...the boss changes every two years and we don't know who we're going to get. We may get someone who is fair and good and knowledgeable, or we may get Joe Shmoe off the row who doesn't know a thing about running a town government.

She went on to explain that the qualifications for the job of First Selectman are few, and the pool of people who are willing to run for the position is limited. Being a relatively low-paying and rather demanding job, candidates must have the financial means to leave their career for two years with no guarantee of being re-elected. This is perhaps why so many of the previous First Selectmen have been either farmers or retirees—many having no prior experience managing employees.

The structural features of this form of management give rise to many threats to workers' dignity in the town hall. Newly elected Selectmen often view the workers as part of a problem they were elected to fix—in this case, a problem that was animated by the new mood of austerity. "The management," as Karen, the Town Clerk, stated, "changes every election or two while we serve for much longer, and we get these eager new bosses over and over again who want to change everything and make it 'better' [using air quotes] because apparently we haven't been doing it right." This initial assault on the workers by new bosses is likely a direct result of campaign promises to make government "more efficient." These promises imply that the candidates have a better understanding of the jobs of town government than the workers who have been doing them for many years. With the rise of the Tea Party and

<sup>4</sup> Arthur, the First Selectman, was at the beginning of his second term at the time of my observations. Prior to that, he was on the board under the previous First Selectman who held office for two terms, making a total of six years of service for Arthur. The preceding two First Selectmen were in office for one term and two terms, respectively.

increased calls for austerity, the potential threats posed by a newly elected government were exacerbated.

The town hall workers believe they have valuable experience and job-specific skills, but the new leaders do not always value, or perhaps even resent, their knowledge (Braverman 1998). Thus, the frustration with frequent managerial turnover is due in part to the devaluation of workers by new leaders who, as Dave, the Fire Marshal, suggested, “don’t really understand the job of running a small town.” The town hall workers considered themselves to be white-collar professionals and firmly believed their accumulated knowledge made them valuable, and thus they should be seen as useful to a new manager wishing to run the town efficiently. However, they knew from experience that almost always the new manager wanted to do things “his own way,” and in the current economic climate that likely meant cuts.

A second and related threat to dignity was the inexperience of new leaders with managing employees. As Grace, the Tax Collector, put it, they were “used to managing cattle and tried to use the same methods with us.” The current First Selectman, Arthur, was a cattle farmer. Many of his predecessors also came from agricultural backgrounds with little or no experience supervising office professionals. Maureen, the Assistant Tax Collector, described her first encounter with the current First Selectman when he took office: “He asked what I did, and I told him. He then chuckled and said, ‘Then what does the actual Tax Collector do?’ I started to explain the difference, and he just cut me off and ‘never mind,’ he said, in a very sarcastic tone, ‘You *clearly* have

a lot of important things to do and better get back to work.” Others spoke of his inability to say “hello” in the morning, but later emerging from his office to bark out orders. Karen described having a sense that he did not see them as equal human beings, but just “tools or animals” to use as needed.

Several of the workers expressed a preference for having a professional town manager to supervise the workforce instead of an elected First Selectman. Some other towns across the state had created a town manager position, which provides consistent management across elections and ensures a professionally trained manager with experience managing and interacting with employees. While favoring the town manager model, the workers acknowledged this option was unlikely in Smalltown because of its size, commitment to tradition, and aversion to paying for a highly-skilled, full-time manager.

A third threat to dignity posed by the regular managerial turnover is the abrupt and unpredictable change of course that ensued whenever a new First Selectman took over. From managerial style, to policy, to the tasks performed by particular workers, to the most mundane workplace practices like the use of the water machine and break room—everything was open to complete transformation. As described by Melody, the Secretary to the First Selectman, “Every time a new First Selectman gets elected, even the simplest of daily routines is up for grabs. Employee handbook? Yup, we’re gonna have to rewrite that.” While this kind of change is generally true whenever a new manager takes over an office, the frequency and regularity of this occurrence in Smalltown created the experience of perpetual

disorder. Clingermayer and Feiock (1997) find that the frequent turnover of leadership in municipal governments causes chaos and inefficiencies. Chronic change in management often leads to radical shifts in priorities, leaving employees who had invested years in a project now being directed to abandon it and focus on something new—only to have it abandoned again after the next election and never experiencing the pride of completing a project.

The inconsistency in priorities, the mismanagement of employees, the lack of long-term goals, and the chronic abrupt changes in direction parallel the “chaos on the shop floor” detailed by Juravich (1985). While studying a small manufacturing company called National, Juravich found that short-term profit motivation coupled with incompetent management led to the normalization of chaos. That is, decisions that would seem irrational to most people began to make sense in the culture of the workplace. The price for this chaos was high both in terms of institutional success, as well as employee turnover and worker self-esteem. Although the workplaces, workers, and nature of the work performed at National and Smalltown are worlds apart, the experiences of the workers are strikingly similar. In Smalltown, the chaos caused by frequent managerial turnover was also normalized. Essentially, the town hall workers would grin and bear it, ride out the period of disruption, and perform their duties as efficiently and professionally as possible.

The waves of managerial transition that had taken place just prior to my observations caused considerably more stress than usual among the town hall

workers because of the Great Recession. The mood of austerity among voters nationally and locally, as represented by the success of the Tea Party, and the budget cut priorities of local candidates promised to make the period of chaos more contentious than usual. For Karen, the Town Clerk, a union contract was viewed as an opportunity to “create stability and consistency” across these periods of disruption and chaos. Further, a union would allow the workers to have a say in what those workplace procedures would look like. As Jessica, the Assistant Town Clerk, put it:

With a union we could have some continuity—protection—because, okay, we signed a contract for three years; you’re getting voted in for two years? This is what you’re working with for two years because we only signed [the contract] a year ago... At least for the next two years we know where we stand and we had some say in it.

Clearly, the stability provided by a union contract across periods of managerial transition would greatly improve the level of dignity at work for the town hall workers and yet until the Great Recession, the chaos of managerial transition was normalized in Smalltown and the workers chose to remain loyal rather than exit or use their voice.

### **Gender Discrimination**

The second component of the triple threat to dignity in Smalltown was gender discrimination. The town hall workers would use phrases such as “playing favorites” to describe the First Selectman’s friendly social relations with the male maintenance workers,



which contrasted sharply with his more overbearing demeanor with the women. Overall, the women felt they were treated as incompetents who needed to be closely managed and continually instructed. A succinct account of this disparity was apparent in an interview with Grace, the Tax Collector:

It's always a matter of the Selectmen seeing the male workers as equals or peers, but seeing us, women, as subordinates—I mean, like really low down the totem pole and in need of directions constantly. And it's funny to me because we come to work dressed very nice and do the jobs that none of them could figure out in a million years, and they are like, all dirty, just back from digging holes or something and smelling like manure and cigarettes. No disrespect, of course, their work is important, but so is ours.

The First Selectman's disparate treatment of the two groups of workers appears to be rooted in a set of conservative cultural beliefs about gender, which are generally regarded as foundational to gender discrimination in the workplace (Ridgeway and England 2007). Whether consciously or not, individuals may translate their ideas about gender into discriminatory behaviors through sex categorization, gender stereotyping, the production of gender-based in-group/out-group processes, and the formation of discriminatory policies and practices in work organizations (Reskin 2000; Glick and Fiske 2007; Ridgeway and England 2007).

Conservative cultural beliefs about gender often lead individuals to value men's work over women's work. The genial relationship between the men on the Board of Selectmen and the male maintenance

workers was based on mutual respect for each other's work. Since the First Selectmen, as well as the town maintenance workers were part-time farmers—or at least regular users of heavy equipment such as tractors and backhoes—they had a lot in common. A couple of the maintenance workers who occasionally helped out Arthur, the First Selectman, on his farm on weekends received special treatment at work. The women, none of whom were farmers, had little opportunity for such *quid pro quo*. This genial relationship prompted many of the town hall workers to refer to the men as “the old boy's club.”

The same cultural beliefs that place men's work on a pedestal have also contributed to the devaluation or “feminization” of “women's” work (Reskin and Roos 2009). Previous research finds that when jobs are performed overwhelmingly by female workers, they tend to have lower salaries, more precarity, less benefits, and receive less respect from management (Reskin and Hartmann 1986). As the previous quote from Grace indicates, the First Selectman had less respect for the white-collar work performed by the women in the town hall than he did for the blue-collar work performed by the male town maintenance workers. Conversations with Tom, the union representative, and Rachel, the union organizer, reinforced this perception. Tom told me that it was “typical in these kinds of small towns” for the men on the Board of Selectmen to have “very different relationships” with the town maintenance workers compared to the white-collar town hall workers. Rachel overtly used the word “sexist” to characterize most First Selectmen she had dealt with, including Arthur in Smalltown.

Throughout the literature on work and occupations, the physical segregation of men's and women's work is considered to be a major factor that reinforces gender discrimination in the conditions and rewards of work (Roth 2004; Hirsh and Kornrich 2008). That is, the discriminatory effects of cultural beliefs and gender stereotyping are often compounded when they interact with structural features such as the sex composition of the workplace and the gendered distribution of labor within the workplace (Glick and Fiske 2007; Ridgeway and England 2007). In Smalltown, there was a great social and physical distance between the men and women. The work performed by the women in the town hall was performed under the watchful eye of management throughout the workday, whereas the town maintenance workers were dispatched throughout the town and generally outside direct managerial supervision.

The one male town hall worker, Dave, the Fire Marshall, occupied a unique position which offered great insight into the gender dynamics of the workplace. Like the "marginal man" as envisioned by Simmel (1971) and later elaborated by Park (1928), Dave straddled both worlds. His job embodied many of the characteristics of the women's white-collar jobs, but it also shared the autonomy and minimal supervision of the blue-collar jobs because he was often out of the building doing inspections. The First Selectman was uncertain as to how to deal with him, but ultimately let him go his own way and treated him more or less like one of the male maintenance workers. In other words, his gender gave him a pass. From his unique perspective, Dave recognized the difference in treatment by the First Selectman of the women and men workers:

They [the women workers] definitely have to put up with a lot of crap in the office. I hear it throughout the day. Arthur [the First Selectman] is constantly criticizing them or trying to teach them how to do their jobs. I don't think he really understands what it is that I do, though. He sees me in the office and then I leave to do inspections. I come back the next day and spend a few hours typing up reports and signing permits. I'm not in the [town hall] building from 8:00-4:00 every day and he doesn't know a lot about what I do, so I'm sort of left alone, which is fine by me.

This account from Dave provides three valuable insights. First, he sees the mistreatment the women town hall workers face on a daily basis and empathizes with them, but, on the other hand, is grateful to have the independence that his job (and gender) gives him. Second, as the one man in the town hall group, he has a more autonomous job than the women. Third, the First Selectman does not understand his work and as such likely does not classify it as either "man's" work or "women's work." As a result, while he does not include Dave in the "old boys club," he also does not over-manage him like he does with the women workers. Importantly, from his marginal position—with insights into both worlds—Dave affirms the perception by the women that they are being treated differently than the town maintenance workers.

Bobbitt-Zeher (2011) argues that a comprehensive understanding of gender discrimination at work requires exploration not just of the cultural component of gender ideology, but the structural features of sex segregation and formal policies, and the behaviors of institutional actors who design and enforce such

policies in everyday work settings. Throughout the interviews, I found numerous examples of gender stereotyping interacting with workplace structure to create forms of discrimination, including discretionary policy usage. For example, the First Selectman, Arthur, decided one day that he did not trust the town hall workers to fill in their own time cards, which they had been doing for decades, so he installed a time clock. Karen, the Town Clerk, recalled the introduction of the time clock during an interview:

So, we had this staff meeting where they decided we were going to use punch cards and a time clock. Grace is salary—our Tax Collector—and she has to use one, so she said—at this meeting—as it’s being introduced, “Do I use it?” and he [First Selectman] said “Yes.” So she looked at Chuck [parks department director] and she said, “Well, are Chuck and Jimmy [highway department supervisor] using one? Cause they’re salary.” And he [First Selectman] said, “No, they’re not; they’re doing something different.” She’s just like “Okay, what are the rules, like...who’s using it, who’s not, and why?” And, of course, he had no answers.

The decision of the First Selectman to put in a time clock—followed by his ambiguous requirements for its use—was taken as an act of discrimination by the women who worked in the town hall. The minute to minute management represented by the new time clock policy sparked deep resentment among the women and also symbolized their reduced status in the workplace. They felt insulted by the intimation that they were less trustworthy than their male counterparts who did not have to punch in and out of work.

In Smalltown, the physical and social separation of women’s work from men’s work intersected with the First Selectman’s cultural beliefs about women needing to be closely managed to create discriminatory treatment. The women who worked in the town hall had mostly put up with the gendered attacks on their dignity for years because they had good-paying jobs and there were few alternatives for exit in the area. But, in the new climate of neoliberal austerity, these gendered attacks were more threatening than in the past because they threatened their jobs and thus triggered a desire to use their collective voice to sustain their well-being.

### **Neoliberal Austerity**

The third component of the triple threat to dignity was neoliberal austerity, which produced great uncertainty for the Smalltown workers. Following the Great Recession, a wave of budget-cut fever ran through the public sector from the national to the state and local level. The Smalltown workers were fearful that their jobs could be eliminated by way of downsizing, privatization, or combining of services with neighboring towns through “regionalization.” This threat emanated not only from the newly elected Selectmen but also from the angry taxpaying voters who had been whipped into an aggressive anti-government frenzy by the Tea Party rhetoric that was rampant at the time. Melody, the Secretary to the First Selectman, explains the shift in voter sentiments that occurred after the start of the Great Recession:

As the economy has dipped these last few years, we are at the mercy of the taxpayer who goes to a meeting

and says, “Why should she get benefits? I don’t get them at work anymore?” And they have the power of simply voting down a budget, and we don’t have insurance anymore. In our position, we have management who gets to make decisions and the board of finance gets to make decisions about our jobs, and so do the taxpayers who can stand up in a meeting and say, “I don’t think the tax office needs an assistant and, maybe not this year, but next year Maureen is getting her hours cut.” Where else [could this happen] other than the public sector?

Melody’s comment was reinforced by similar stories told by nearly all of the town hall workers when asked how their jobs had changed in recent years and all portrayed the shift as negative for their work-life.

It should be noted that this attack on the public sector was not unique to Smalltown at the time. On the nightly news the workers would hear stories of Midwestern states taking extreme measures to cut their budgets. In Wisconsin, Governor Walker effectively eliminated collective bargaining rights for tens of thousands of public sector workers. In Michigan, Governor Snyder dissolved several locally elected governments and appointed emergency managers to implement major cuts in municipal expenditures. This broad national sentiment was beginning to be expressed at the state level in Smalltown’s home state which faced budget issues which were trickling down to the municipal level. In this mood of anti-government fervor, Arthur, the First Selectman of Smalltown, ran and won on a campaign of making government smaller and more efficient. Reducing budgets, cutting taxes, and privatizing services

have long been at the center of conservative politics, but until recently these policies did not—at least not in their extreme forms—have a lot of traction with most voters in places like Smalltown. However, the combination of an extreme economic downturn and the rise of neoliberal ideology joined forces to make the jobs of Smalltown workers a primary target for conservative politicians and voters.

The Smalltown voters who suffered in the Recession were angry and saw one group who they had power over—the public employees they paid with their taxes. Rachel, the union organizer who helped the Smalltown workers organize, described a “complete lack of working class solidarity” on the part of private sector workers towards the public sector. Describing the attitudes of taxpayers, she noted that “rather than saying, ‘Hey, how come my benefits are being cut?’ they instead look at the public sector and say, ‘Hey, how come their benefits *aren’t* being cut?’” The following excerpt from an interview with Jessica, the Assistant Town Clerk, describes the animosity they felt from private sector workers during this time:

Only in the public sector does the general public get to come forward and say, “I think that person should go. I think that job should go. I think that job should be less hours.” Believe me, go to the town meetings and listen to them say, “I got cut on my benefits at work, so they should take a cut on theirs.” So, basically, at town meetings you get the people who say, “I had it rough this year, so I want to make it rough for others, and the one group we can do that to is the people that we pay with our taxes.” They can’t walk into a business and say, “Make your employees suffer

because I am," but they can walk into a town meeting and say, "Hey, I'm not paying taxes, so these people can have more than I can have." We've been hearing that for the last few years at town meetings.

Jessica's comments reveal a core sentiment among the town employees, the feeling that many private sector workers wanted to ease their misfortunes by creating misfortunes for others. This passage and others highlight the unique features of public sector employment and their fundamental relationship to the overall political and economic climate of the community, state, and nation.

My conversations with the town hall workers also revealed how personal the effects of neoliberalism felt to them. It was their neighbors at town meetings demanding cuts and their immediate supervisor publicly promising cuts. This very personal experience differs from typical encounters with neoliberalism in large-scale, state or federal workplaces which have more layers of management and thus neoliberalism is experienced as an impersonal structural shift emanating from a complex and faceless bureaucracy. But, unfortunately for the workers in Smalltown, they are also threatened by cuts from the state level as Karen, the Town Clerk, described:

If anyone wants to pick on us as a group, it can come from many different directions—from pretty much anybody. Not just the taxpayers. You know, the state can cut funding and that affects the town. Right now they are talking about regionalization. Are they going to regionalize some of these jobs and suddenly our jobs are cut as they have been combined to cover three towns?

The Smalltown workers face the threat of budget cuts not only from the local taxpayers and the town government but also the state, representing a marked increase in the precarity of their work in the wake of the Great Recession.

In addition to the fear of job loss, the Smalltown workers were also being asked to do more with less. For example, Karen, the Town Clerk, spoke about the copying machine which had broken down. It was apparently a rather old machine, long overdue for replacement, but the First Selectman continually insisted on temporarily repairing the machine or asking the workers to remove the jammed papers. This took time away from the normal duties of the Town Clerk and others, but they were still expected to complete the same amount of work within a given day. "So now," Karen told me, "I'm an office machine repairman, as well as a Town Clerk. But, I don't get paid to fix the copier and so I guess I'm using my lunch break time to wrestle with that thing." Being asked to do more with less is a classic threat to dignity at work. It is difficult for workers to experience a sense of pride and achievement in their work when the proper materials or time are not available to complete tasks successfully (Juravich 1985; Hodson 2001).

The Smalltown workers came to see unionizing as perhaps the only way to stabilize their work arrangements. They hoped to preserve the best of their current conditions and benefits by working them into a legally binding contract. The drumbeat of austerity in addition to the open hostility towards them made the use of voice more appealing, since they felt like they did not have anything to lose. As Grace, the Tax



Collector, put it: “If they are going to lay us off regardless, even if we do everything they want, it’s never enough, then we really have nothing to be afraid of when we stand up and push back. That’s why we called the union, because if they are going to fire us anyway, what have we really got to lose?”

## **Demanding Dignity in Smalltown**

The experience of the Smalltown workers demonstrates the clear and present threat to dignity at work in the public sector posed by neoliberal austerity. At both the personal and collective level, the workers’ ability to experience a sense of self-worth and self-respect was undermined by increased fear of job loss, reduced resources with which to complete their work tasks successfully, and increased pressure to compete with each other over the right to stay employed. The already present threats of frequent managerial turnover and gender discrimination combined with the rise of neoliberal austerity to create a triple threat to dignity.

The election of a conservative Board of Selectmen on a platform of austerity amplified the threat of managerial turnover, leading to increased perceptions of insecurity. The Smalltown workers noted a distinct switch in public and managerial attitudes following the Great Recession, including a constant drumbeat about the need for cuts and making town government more efficient. These kinds of remarks coming from the town Selectmen, as well as the local voters created a sense of insecurity which had not existed during previous rounds of managerial turnover in Smalltown. The conservative gender ideology of the Selectmen also intersected with the neoliberal push

to cut jobs. For example, there was never any mention of job cuts or reductions in hours for the male, maintenance workers. However, the usefulness of the work performed by the town hall workers was constantly called into question. Again, the valuation of the maintenance work performed by the men appeared to insulate their jobs from discussions about the need for austerity.

In the face of these rising threats to their dignity at work, the town hall workers did not choose to exit and quit their jobs, but rather they decided to use their collective voice in an attempt to improve their situation. Gunderson (2005) suggests that the decision to use voice may be more common in the public sector due to a variety of structural features of public employment. When considering Smalltown, we can identify several characteristics that may have increased the use of collective voice as opposed to exit. First, being in a relatively isolated part of the state, re-employment options are generally limited. Second, due to the highly specific skill set required for these jobs, there were few private sector equivalents and even fewer that paid well or offered decent benefits. Third, the age composition of these workers—mostly over 50—makes career change very difficult. Further, the ongoing economic slump and resulting slack labor market make re-employment very difficult—no matter how much a particular employee may want to leave their current job. When exiting is not a good option, then the demand for a workplace that fosters dignity and respect is increased.

Other theoretical considerations for increased worker voice in the public sector include higher average

levels of education and increased devotion to their work (Gunderson 2005). Many public servants go into public service because of a passion for helping others (Lopez 2004) or a sense of public duty and civic responsibility to “do good” for society (Reder 1975:28). The educational level of the employees in Smalltown is varied, with most having some college, but few holding four-year degrees. Their devotion to serving the public, however, came through as a common theme when asked to describe how they came into public service and why they remain in it. Another factor could be the level of benefits relative to other comparable jobs. Although the Smalltown town hall workers never had a union contract, their pay and fringe benefits were comparable to those in larger towns that had unions, likely due to spillover effects of their collective bargaining agreements (Farber 2005).

While these structural features of public employment have been in place for decades, the actual decision of the Smalltown workers to use their voice was triggered by the rise of neoliberal austerity and the threat it posed to job security. In an exercise of what Hall and Lamont (2013:2) call “social resilience in the neoliberal era,” the Smalltown workers banded together to sustain their well-being in the face of challenges to it. The theory of loss-aversion in economics and psychology also suggests that humans will generally put a disproportionate amount of energy and effort into protecting against losses (Kahneman and Tversky 1984). Wallace (1989) finds support for this argument in an analysis of union workers’ strikes for “defensive control” from 1947-1981. The elimination of job security, proposed reductions in staff, and the taking

away of resources—in short, the deterioration of dignity—represent real losses that the Smalltown workers felt a need to prevent. As Dave, the Fire Marshal, put it, “Since they might lay us off anyway, we might as well fight like hell. There ain’t nothing more to lose.”

## Discussion and Conclusions

The proliferation of government austerity that is associated with neoliberal hegemony and the resultant increase in precarity of public sector work poses a real threat to dignity at work in the era of neoliberalism. In the face of ongoing budget crises in state and local government—real or manufactured—public sector work has become much less secure and in many cases is characterized by a constant fear of layoffs. Budget cuts can also leave the workers who deliver public services lacking adequate resources to complete their work tasks competently or thoroughly—a situation which also undermines dignity at work. As we have seen in Smalltown, neoliberal austerity can also interact with and exacerbate existing threats to dignity at work such as the chaos of frequent managerial turnover and persistent gender discrimination. However, the case of Smalltown also reveals that in certain circumstances, the overt threats to dignity posed by neoliberalism can serve as a catalyst for workers to use their collective voice to address workplace problems. When faced with the threat of job loss, speaking up and fighting back becomes less risky. As Karen, the Town Clerk, said: “If I’m going to lose my job, I at least want to know I did everything I could to try and save it and if nothing else speak my mind on the way out the door.”

According to Larson and Nissen (1987), no workplace is ever completely unorganized. Whenever human beings live or work together, informal groups develop and standards of conduct and acceptable norms of behavior arise. It is no secret that the history of labor organization has often been the history of informal work groups becoming formalized through union organization in response to attacks upon established norms. The structural features of public employment in Smalltown made exit less desirable for these workers and helped to facilitate their use of collective voice to address threats to dignity at work. The Smalltown workers voted to form a union, negotiated a first contract, and voted to ratify that contract.

Through the use of their voice, the Smalltown workers were able not only to address some of the concerns associated with austerity but to challenge the triple threat to dignity they faced by also addressing the chaos associated with managerial turnover and the unequal treatment of women in the workplace. Their union contract ensures stability for the workers across changes in management and ensures fair and equal deployment of workplace rules for all workers, regardless of gender. While the contract cannot protect them entirely from layoffs, it does establish criteria to protect

them from unfair firings, as well as a set of job descriptions which make the elimination of positions more difficult. In addition to these specific gains, unionization has brought these workers into the larger anti-austerity movement of public sector unionism that has been fighting to protect public services and prevent privatization since the rise of neoliberalism.

Perhaps most importantly, the experience of having used their voice appears to have emboldened these workers to use it further. As Karen, the Town Clerk, stated:

It has taken a long time to negotiate, but this contract has really made improvements. I just can't believe we never did it before. I mean, all the things we put up with over the years. It hasn't been easy, but it was totally worth it and in three years we will work on it more and try to address some of the other concerns we didn't focus on this time.

The anger and dark humor I encountered on first meeting these workers who were fearful of losing their jobs transformed over time into a sense of power and pride in what they had accomplished together through their negotiations—a renewed sense of dignity at work.

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## **The Multi-Dimensional Influence of a Sports Activity on the Process of Psycho-Social Rehabilitation and the Improvement in the Quality of Life of Persons with Physical Disabilities**

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**Abstract** Purpose: The purpose of the research is to analyze the role that sport plays in the lives of persons with physical disabilities within the process of rehabilitation and the improvement of their quality of life.

Background: The article raises the notions of changes that take place in the life of a physically handicapped person which is due to their engagement in a sports activity. In the article, I refer to the subjective perspective of those researched, rendering their own point of view into the major subject of analysis.

Methods: Qualitative data are exploited in the research, collected through a technique of unstructured interviews and undisguised observations conducted among the disabled practicing sports.

Findings: The role of sport practiced by the disabled has been determined within several contexts, which were distinguished within the course of the research as analytical categories.

Conclusion: On the basis of the research it was found that getting involved in a sports activity is significant within the process of experiencing life satisfaction, personal development and the reconstruction of the ego, self-identity, and transformations in the manner of perceiving both themselves and others. Therefore, a sports activity of a disabled person supports the rehabilitation process effectively.

**Keywords** Physical Activity; People with Disabilities; Life Changes; Self-Perception; Personal Experiences; Qualitative Research

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## Introduction and Theoretical Background

The sport of disabled individuals has its beginnings in the previous century, and its development was especially influenced by newly established organizations whose aim was to direct and manage various forms of activating people with psycho-physical dysfunctions. Over the course of several years, both the conditions and possibilities according to which disabled people had to practice sport have changed, and other events that accompanied that process determined a gradual transformation from rehabilitation, through recreation, to extreme sports (Molik, Morgulec-Adamowicz, and Kosmol 2006:63). This course of the development of disabled sport is continued in its current comprehension. On the one hand, it is allocated to the broadly-understood process of rehabilitation and, on the other hand, it is an integral discipline of physical culture. Therefore, the sport of the disabled may take various forms, starting with rehabilitation sport, through recreation-amateur, to extreme sports.

Regardless the manner and character of the sporting activity of the disabled, it is assumed that it is a specific type of activity, related not only to corporeality but also to “being a social phenomenon, which is ascribed with certain meaning and which is perceived by a given community in a particular manner” (Heinemann 1989:238). As emphasized by Klaus Heinemann (1989:239), sport is “a result of circumstances which are frameworks for actions and decisions which include elements of social acceptance and patterns to follow, life experiences, and individual and social identity.”

Sport understood in such a manner is close to the category of *action*, which is placed in the center of the theoretical assumption of symbolic interactionism that constitutes the theoretical framework for these deliberations. Here, an action is composed of activities undertaken by particular individuals that interact with themselves and with one another (Blumer 1969:69-71). Therefore, the nature of social reality is of a processual dimension, which is changeable and dynamic (Blumer 1969; Prus 1999). When it comes to individuals, they do not reproduce the schemes of actions, but respond creatively and adjust to a given situation and circumstances (Charmaz 2000). An action has the nature of a behavior construed by a human being, not its response that results from particular external factors that do not depend on the individual himself/herself (such as physiological stimuli, drives, needs, feelings, attitudes, norms, values, etc.). A human’s response to the desires, feelings, and actions of others, and their requirements or expectations towards them, is not passive, but conscious, using their ego and mind (Blumer 1969:52).

People who interact with one another, who communicate, thus provide the basis for the construction of a real and intersubjective world of people endowed with the sense of their own ego. Here, individuals are active and fully aware actors, acting on the basis of meanings ascribed to objects, therefore co-creating reality, and not reacting passively and lifelessly to external stimuli (Hammersley and Atkinson 2007).

Hence, symbolic interactionists are inclined to perceive people as active social actors who reconstruct

a picture of the surrounding reality and of their place in the life space imagined in that way, continuously and during interactions with other members of a given community. Robert Prus and Scott Grills (2003:19) believe that symbolic interaction—as perceived by interactionists—“may be seen as an examination of ways in which people provide their life situation with meaning and devote themselves to activity in relationships with others.”

As concluded by Herbert Blumer (1969:51), “the process of interacting with oneself places a human being towards the world and not within it, this causing the need to deal with it through the process of defining, not simply responding.” However, in order to become an object for oneself, we first need to become an object for others. By adopting a metaphorical comparison, we can say that we need a mirror in the form of other people, the reflection of which will allow us to take on their roles (Krzemiński 1986:47).

Concepts formulated in such a manner affect the essence of the social constructivism perspective,<sup>1</sup> according to which people perceive reality through the prism of their cultures and experiences, ascribing what they see with specific meanings. At the same time, nobody is capable of observing an objective reality, detached from imposed meanings and concepts. What defines the world as the socio-cultural reality is, first of all, the various premises of

human activity, actions, and also processes, events, interpretations, and values—but not objects, things, or facts (Wendland 2011:23).

Taking into account the above mentioned theoretical references, in the research that this paper is based on, I refer to the subjective perspective of the researched individuals, making their own point of view a basis for the construction of theoretical generalizations (Włodarek and Ziółkowski 1990:55). The research is intended to identify meaning in the experiences of ordinary people, thus answering the following questions: How is the experience—in this case, practicing sport—provided with meaning? And, how is it defined, interpreted, understood, expressed, and embodied? Therefore, I would like to put forward a preliminary thesis that sport may exert influence in two directions. On the one hand, it may change the social image of a disabled person through presenting the disabled in a manner different from stereotypes. On the other hand, and the one which constitutes the subject of my research interests, it may change a disabled person's life definition, first of all, in the matter of perceiving himself/herself as a fully-entitled member of a given community (Corbin and Strauss 1985). Hence, practicing sport may be treated as an activity which triggers transformation, from a disabled person accepting—according to the social perception, often of a stereotypical nature—the imposed manner of the interpretation of reality, to rejection and acceptance of a new set of definitions, where previous ways of perceiving himself/herself are reformulated (Charmaz 1983). Disability becomes an element of an individual's life that is possible to be accepted, attracting just the attention of the disabled person who is now

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<sup>1</sup> The term constructivism is ascribed to all those approaches in the sociology of scientific knowledge (Zybertowicz 1999) that research scientific development as a result of social operations, and thus they do not assume that scientific knowledge reflects an independent reality or results from the application of historically unchanged principles of research conduct (Amsterdamska 1992:137).

capable of moving from a passive to an active attitude (Williams 2000).

Therefore, in a later part of the article, I will make some attempts to determine the fields and contexts of disabled people's lives that host qualitatively significant transformations rooted in their sports activity. To grasp their complex and holistic character, I will focus on functions that may be ascribed to practicing sport by people with an acquired disability, and the meaning for the general well-being of an individual.

## Methods

### Data Collection

The research material applied in this study encompasses personal experiences of disabled people, realizing their physical activity through participation in various forms of sport. Semi-structured interviews were conducted with representatives of this category of disabled people. Questions posed in the interviews covered topics such as the role and meaning of the researched people's participation in institutionalized forms of sporting activities. By applying triangulation of data, the study also applied some records from participant observations made during meetings and sport events, training sessions, and consultations (Adler and Adler 1994). The research was performed between 07/2013 and 12/2014 across Poland, in training centers devoted to and adjusted to the needs of the disabled. While starting to develop this text, the empirical material comprised 47 interviews and 23 records from observations (as of 01 September, 2015). The interviews

were performed with 20 women and 27 men between 16 and 50 years old. The interviews were carried out with physically disabled individuals (taking into account all types of bodily dysfunctions, excluding the deaf and intellectually disabled). The group of respondents included individuals who represented the following sport disciplines: athletics (running, long jump, high jump, javelin, shot put), table tennis, sitting volleyball, goalball, wheelchair rugby, and wheelchair basketball. The interviews usually lasted from 40 to 120 minutes. Before analysis, the interviews were transcribed word-for-word, preserving the details of the interviewees' utterances as faithfully as possible.

### Ethical Considerations

The participants were assured that all information provided would be treated with anonymity and confidentiality, and pseudonyms are used throughout (see: Saunders, Kitzinger, and Kitzinger 2014; 2015 for details regarding the anonymizing strategy). All participants gave written informed consent before participating. All quotations cited are in the participants' own words. All interviews were audio-recorded and transcribed verbatim.

### Data Analysis

Data analysis was an iterative constant comparative process involving descriptive and interpretive analyses (Miles and Huberman 1994; Patton 2001). The analysis of the research material is performed in accordance with the procedures of grounded theory. Data analysis involved open coding and axial coding. All interviews were encoded with open



coding. Afterwards, with the application of axial coding, the codes were ordered and selected, leading to the generation of the most significant analytical categories, revealing the complex relationship between them. As a result, ten key themes were distinguished, which reflected the main contexts of physical activity of the disabled, in the scope of their psycho-social rehabilitation and improvement of quality of life. Later, the article describes three levels of influence of sport practiced by a disabled person on how they perceived themselves and their life situation. As a consequence, this allowed the question to be answered about the mechanisms of sport's influence on a disabled person's life which improve their quality of life.

The research used interviews performed with physically disabled people. The main criterion of selection was acquisition of disability in adult life (i.e., from the moment when a person becomes 16 years old) and practicing sport (for at least one year). The selection of subsequent cases for the research was of a theoretical character (*theoretical sampling*), based on the constant comparative method. Thanks to theoretical sampling, the researcher, while collecting, encoding, and analyzing the materials, makes simultaneous decisions about where and what data to collect (Glaser and Strauss 1967). While applying the constant comparative method in the search for other data, the researcher makes an attempt to choose cases that are both highly diverse and similar to each other, to understand the maximum number of conditions differentiating the presence of categories and their mutual correlations (Glaser and Strauss 1967). Such a manner of performance resulted in people repre-

senting various kinds of physical disability being part of the researched sample. There were people with quadri- and paraplegia, spastic paralysis, and those with amputated legs. The selection of cases lasted until the theoretical saturation of the generated analytical categories was achieved.

The data analysis was supported by CAQDAS—*Computer Assisted/Aided Qualitative Data Analysis Software*. The work on the analysis-conceptual level was carried out with the NVivo 11 program, which supported the process of ordering and sorting the data, creating categories, and developing hypotheses and constructing an integrating diagram (Lonkila 1995; Richards 1999).

### **Assurance of Quality**

I followed Lincoln and Guba's (1985) principles of trustworthiness, as well as Charmaz's (2000) validity guidelines for grounded theory. Theoretical saturation, constant comparative analysis, trustworthiness, and validity checks provided assurance of data quality and rigor (Lincoln and Guba 1985).

### **Results**

The research results suggest that sport presents a hugely significant life activity of a disabled individual. It allows an individual to influence his/her situations in a multi-dimensional and multi-threaded manner. For disabled people, sport is significant within the process of experiencing life satisfaction, personal development and reconstruction of the ego, self-identity and transformations in the manner of perceiving both themselves and others.

Based on the performed analyses, the author succeeded in identifying three levels of influence of sport practiced by a disabled person on how they perceive themselves and their life situation. The first one is related to the notion of the body and the transformations that take place in the bodily sphere of an individual, through their sports activity. The second aspect refers to the broadly understood interpersonal relations of a disabled person with their surroundings, shaped as a result of practicing sport. The third aspect is connected to the problems of subjectivity of a disabled person, which is reconstructed as a result of experiences arising from practicing sport and the accompanying transformations of the process of perceiving themselves and their life situation.

### **(Psycho-)Physical and Body Transformations**

The first aspect that was mentioned, which may be called psycho-physical, is related to the process of discovering the possibilities of their body, therefore of exploring it again. In this context, practicing sport makes a disabled person start to pay more attention to their corporeality, which causes their body awareness to improve. Sport allows them to overcome their shame, the feeling of embarrassment resulting from their disabled body, because it requires a person to present themselves publicly and to show themselves in a manner that usually deprives them of the attributes that hide the dysfunction (e.g., prosthesis or clothes). Therefore creating a basis for a new perspective of perceiving themselves. This is somehow forced by practicing sport, through experiencing their body, accompanying the situation of making the dysfunction public. A sports activity

allows both the affected person and others to get accustomed to the look of a dysfunctional body, and it strengthens the process of its acceptance and overcoming the interconnected trauma.

It was not easy because, for me, as someone who was afraid of other people's looks, the fact that someone could see me without my prosthesis or the clothes that covered it was enormously difficult. I did everything so that no one could see me and my deformity just like that. It was important for me because I was afraid and ashamed of what I am, and I was worried that others would be looking strangely and judging me. So, when I had to undress and take my prosthesis off for the training for the first time, I was really scared. But, now I know that if it hadn't been for that, I would still have a problem with normal functioning, without bigger worries that someone might see me and say something to me. [Lucy, a disabled person who practices sport]

Several key qualities may be highlighted for such a function of sport for individuals with a physical disability. The first of the discussed qualities of sport, which refers to the body transformation category and the more broadly understood physicality sphere of an individual, is brought down to an improvement of their body. In such a situation, sport is a certain kind of development, or continuation of medical rehabilitation, which brings the individual back to a specific level of capability, possible to be achieved. Thus, sport is to be comprehended here more widely, as a special liberation of a disabled person through physical activity. This liberation consists in breaking the limitations of their body, in strengthening it, and reaching an optimal level of

capability. Therefore, the person becomes more independent and self-reliant, experiencing the feeling of greater control over their life. It is significant especially in a situation when a given person, as a result of specific events (e.g., an accident or a disease), lost their previous capabilities, which disturbed their independence and self-reliance. As suggested by the respondents, in such a situation, sport provided them with a possibility to develop in numerous dimensions, it supported the improvement of physical conditions, resulting in the process of the gradual transformation of how they perceive themselves and their own bodies (Kuppers 2004).

Since I started moving, taking part in training sessions, my condition has improved significantly, I have a different attitude towards my possibilities because I feel that I can do more than in the past. This is the matter of not only my condition, but of my psyche as well, because one is strictly connected to the other. Currently, I have no bigger problems with going out, doing something, I simply feel more self-reliant than in the past. [Mark, a disabled person with a damaged motor organ]

Thus, through practicing sport, a disabled person may in some respect regain what they lost, namely, their skills and physical abilities, that is, agility, which thanks to the sports activity may improve greatly. The sports activity will not remove the body damage itself, but it is able to exert a positive influence on its performance and general condition, and to strengthen those spheres of the body that may, to some extent, take control over the dysfunctional areas. This is the manner in which the whole body becomes stronger and, thanks to regular exercise,

such a person becomes more capable, and they are characterized with greater coordination of movement and higher control over their body. In numerous cases, an individual may achieve such a level of ability which provides them with great autonomy and freedom, as a consequence limiting their dependence on other people. Therefore, the person becomes more independent, experiencing the feeling of greater control over their life. This is proven by the following quote from one of the respondents:

For me, sport is the route for freedom, for being myself, and staying independent. You know, it's like, thanks to me being active, my general physical condition improved greatly, and I'm much fitter...And, thanks to that I can do more now than I could before, I mean, I generally am in a better physical and mental condition, and how to say that, well, um...I feel better in my own skin [laughter]. [John, a disabled person who practices sport]

Sport, especially for a person with acquired disability, may pose one of the first fields of their activity where they are able to feel joy, satisfaction, and escape from mundane matters for at least a moment. Sport may become a real opportunity for a given person to abandon their everyday routine, and a platform to develop the feeling of having a bond with others. Hence, we have another quality within the discussed category, which is identifying sport as a way of releasing emotions and treating this activity as a source of fun.

I feel really great when I come here. It is the best way to switch off and take a deep breath for me. When I'm so tired, I feel that other issues, which are a burden,

leave me. And, when I leave here, I paradoxically have more power to get through another day. [Tom, a disabled individual with an amputated leg]

Therefore, sport becomes a certain “escape” from the everyday life of a disabled person, where an individual finds a source of joy and is able to forget, or, what is most important, it enables them to find themselves in other spheres of life and support them to find courage in various, non-sport situations.

Sport often becomes the main or the only activity of a person. Then, it is ascribed with the highest rank, becoming the center of life of a given person, around whom all of their other tasks are focused. It is a situation when a disabled person acquires a possibility which could be unavailable if they were fully able. It is especially visible when sport becomes a professional activity, because then it provides the disabled individual with completely new perspectives. There are various trips, participation in training camps and consultations, but also scholarships and money prizes for the best sportsmen, which allows even greater involvement of such an individual in practicing sport. However, this refers to a “handful” of the best sportsmen (usually called to national representation), and the majority of individuals are unable to provide for themselves through sports practicing.

At first, it was just a form of fun for me, and even earlier—a form of rehabilitation. Besides, it’s still like sport is both a form of rehabilitation and fun. And I hope it stays this way, because I’d really want to be in better and better shape, and to derive fun from what I do. But, of course, if you treat sport professionally, it’s

something more, because the requirements are different. First of all, you need to be disciplined, and expect a lot from yourself. This is the only way you can think about any career and achieving a position that matters. [Harry, a disabled individual who practices extreme sports]

But, sport may become a significant activity of a given person, also in a situation when it is not treated professionally but in a purely recreational and amateur fashion. In this case, it plays the role of a hobby, which the remaining activities and actions of an individual are focused around. For a lot of them, the fact they are physically active despite their disability is a prize in itself. Some of the interviewees emphasized that training sessions, as well as the self-discipline that accompanies sport, provide an important component in the process of organizing their everyday issues, and the strive for the best results determines their place not only in sport but also in life.

At present, sport is the most important thing for me. I feel that it is my time and I need to use it as much as I can. Time is passing and I still have so much to do. These are my ambitious goals, and I want to realize them. [Tom, a disabled person with an amputated leg]

Practicing sport in the aspect related to the psycho-physical transformation may also lead to overcoming worries arising from coming out as a disabled person. Some individuals believe that they would not be accepted and they would not find any understanding among able-bodied individuals. This means that they are unable to reveal their disability to other people (they hide and mask it), at the same

time being afraid of exposure. It also refers to situations when a disabled person has a feature which is impossible to hide (e.g., they are in a wheelchair, they cannot use a prosthesis, etc.), which means that the anxiety against the environment, the lack of acceptance leads them to avoid contact with others and thus to self-exclusion. Both of the mentioned situations are reflected in Goffman's (1963) vision of stigma. Invisible in the first case and impossible to be hidden from the environment in the second. They also both mean that a disabled person makes every effort to avoid the exhibition of their disability or exposure to its unavoidable publicity. At the same time, it was found that both the first and the second category of people may experience similar adjusting difficulties, as well as similar successes in the realization of sport, business, scientific, and other careers (Willis, Fabian, and Hendershot 2005).

Therefore, the presence of sport in a disabled person's life often causes a person to overcome their barriers, as it pushes them to expose their disability.

I doubt we would have talked earlier. I didn't want to show myself, I didn't want people to know that I'm disabled. Not until I started running did I begin to look differently at the opinions of others. I now wonder whether I should show myself to people from my town, so there are no doubts or uncertainties that it is as it is, and that I am who I am. [John, a disabled person with an amputated leg]

A disabled person who gets involved in practicing sport needs to face the necessity to present themselves to others in numerous cases, in a manner which leads to the exposure of their—often hid-

den—dysfunction. It usually takes place with the presence of other disabled individuals, and gradually in the broader public context. All of this means that a disabled person becomes more open and ready to take up other—increasingly more demanding—challenges.

### **Transformations in Interpersonal Relationships**

The second analytical category related to physically disabled individuals practicing sport, identified within the analysis of the collected material, refers to the sphere of the interactions of that person with their environment. This category is connected with the possibility of cognition, thanks to their involvement in the sports activity, of other, often previously unknown people, who frequently start to play an important role in the disabled person's life. It happens because the disabled person who takes up the sports activity not only improves their physical conditions but they also develop their motor skills. Additionally, through establishing and maintaining social interactions, they become an active actor within the specific social relations. Sport is a form of activity of the disabled which creates an arena for certain interactions between its participants, and which encompasses numerous social actors. The intensification of such relationships, realized within the environment of disabled people who practice sport, supports the process of developing interpersonal relationships and creates a bond among particular people.

Right, actually, thanks to being in a club [sports club] I met a lot of people, and actually I am close to them, at least some of them. And I must admit that I cannot



imagine a different situation now, but it has not always been so. In this way, without any exaggeration, I can say that when I started to come to the training sessions, my social life flourished. [Katy, a disabled individual, practicing recreational sport]

A disabled person compares their social position with that of others, resulting in their identification with people of a similar level of relative privilege or disability, and the adaption of their attitudes and patterns of behavior. Hence, the individual agrees to plans of actions, and permanently reinterprets their reality through interactions with its members, leading to a discussion with oneself. Thanks to those interactions and specific auto-narrations, he/she obtains a key to interpreting his/her place in the world, and he/she sees things that should be done in a given situation (Mead 1934).

At the same time, the repeating of an interaction with the same social actors, in the same situation, results in a reconstruction of the definition of "self," both of themselves and of their partners, which is not limited to a particular situation. The process of acquiring identity by a social actor takes place during interactions where the anticipated visions of the self, of the subject, are confirmed or modified, therefore influencing subsequent actions taken by the interaction's participants. This is the basis on which a belief regarding both the individual and their partners is created, which becomes significant in various aspects of the individual's life (Turner 2002).

As long as I can remember, I have always had a problem accepting myself, that I'm different than most

of my peers. My parents did everything to help me so I did not feel this way. But, despite that, I have always had this feeling that I'm different, and everyone who knows about it treats me in such a way, meaning, differently than they would treat someone that is completely healthy. So, when a chance arose to try sport, I was very skeptical at first. I thought, "What do I need it for?" But, gradually, as I started trying, I found out quickly that it makes some sense because I feel better, and not only physically. I simply see myself differently than I used to. [Charlie, a disabled person practicing sport]

Another quality of the *transformations in interpersonal relationships* category is related to *sport as a source of support and the search for a reference group*. In this meaning, the environment in which a sport activity may take place is a source of support, enhancing a unit mentally through bringing together people with similar problems, but it also is a field of exchange and sharing everyday problems with others. The issues that may be solved within a group usually go far beyond the sphere of sport, referring to aspects of personal hygiene or formalities with various agendas or institutions. The group members obtain practical knowledge that helps them in solving current problems related to their everyday lives. Such a group also allows them to distance themselves from run-of-the-mill issues for a moment and focus on a completely different activity.

I couldn't pull myself together after the accident. I had a problem for a long time to find my place. Nothing was the same anymore, but I also wasn't aware how it should be now. Actually, only when I started coming to training, when I met my new friends who

have similar dilemmas as I do, did it all start to fall into place. [Alan, a disabled person with an amputated hand]

Hence, participation in a given environment is interconnected with adaptation to the present rules, but also the internalization of particular values. A disabled person becomes a part of a given community, one which starts playing an increasingly important role in their lives. In this context, also the notion of a reference group may be applied as a comparative scheme, in relation to which people make basic judgments and evaluations regarding their social position. It also provides measures and criteria that allow them to determine their social position, which constitutes a basis for the development of the self-esteem of an individual. It also happens in the case of the disabled who get involved in practicing sport. Sport often leads to both an increase in the frequency of contacts with others, but it also supports the search for patterns to follow and the development of bonds between the group members.

Actually, since I had this opportunity and since I've been going to the sport classes, I look at many issues differently. I think that the people who come here with me also have this impact on me, so I now see various issues differently. And also when I see how others behave, how they speak about various cases, about mundane things. I think, I start thinking about and doing many things differently. I simply learn from them, and this is how I change myself. [Mary, a disabled person practicing sport]

Sport of the disabled may be treated as specific areas where both the individual and the whole soci-

ety of the disabled acquire the possibility to present themselves to others in the brightest light, therefore showing that despite some body dysfunctions they are not only self-reliant and independent but they may also successfully carry out various actions and realize themselves in every field of a social life. Therefore, sport creates conditions not only to promote the activity of the disabled but also to support the integration process of the fully able-bodied and disabled individuals. This is supported by various events, especially those promoted by media, that is, of the highest international rank, such as the Paralympic Games. However, integration through sport may also take place on a smaller, although still significant, local scale, and refer to the residents of a given region or town. Such a result is achieved at meetings of disabled sportsmen with students, when it is possible to present their skills and integrate through playing together.

I treat it in such a way that when I do something, I don't do it just for myself. Of course, I do my best to derive some benefits, but I think that's normal. But, apart from that, I simply want to give something from myself, and somehow show it to others that as a disabled person I'm not so resourceless or demanding care...and that other disabled individuals can also do much more, and they are more capable than it may seem. [Harry, a disabled individual practicing extreme sports]

Disabled sportsmen, thanks to successes and their exposure in the media, work actively to the benefit of preventing social exclusion of the whole category of these citizens. They also play a significant role in the fight for equal rights and equal treatment

of all disabled individuals. It is worth highlighting here that the disabled sportsmen who practice sport professionally take up a certain fight with the stereotype, which consists not only in making it public but even exposing their dysfunctional bodies, which might be perceived by others as unaesthetic, deprived of functional assets, or simply as “broken,” hence believed to be synonymous with weakness, sickness, and, to put it simply, the opposite of a healthy body.

I believe that what I do, I also do for others. The first thing is that my relatives are happy with it, and the second is that I can show to others that the disabled, like me, may do different things, and despite being disabled they're not cripples. [John, a disabled person with an amputated leg]

Sport may be treated as a means to an end, providing, in fact, a kind of bridge between physical activity and other kinds of life activity of a disabled person. It means that, for an individual, sport may provide a source of inspiration, but also of the creation of an internal power which stimulates them to become active in other fields of life. It often means greater openness to new experiences of such a person, which in turn supports life progress, both in the private and public spheres. In the first aspect, it, first of all, refers to becoming capable of establishing relationships with other people, and developing closer contacts, frequently leading to long-lasting partnerships. On the other hand, the courage and self-esteem derived from a sport activity mean that an individual starts to present a more assertive attitude in various relations of everyday life, which is highly significant in the context of professional

work, among others. As a result, it leads to the reconstruction of life goals and priorities. This was proved by the interviewees themselves, who highlighted that, in numerous cases, practicing sport and the feeling that they are able to do what they did not expect as disabled individuals supported the positive thinking about themselves and their possibilities.

I believe that the fact that I started to practice sport, that I found myself here, is one of the best things that could have happened to me. After the accident, I was withdrawn, depressed, deprived of the sense of life. Only by other people pulling me out and showing me that something can be done despite the disability, made me believe in myself. It happened that this is the place where I found myself [on the range], and it helped me to pull myself together. [Dan, a disabled person with a defective motor organ]

Another aspect of practicing sport discussed in the article is the fight with stereotypes and the possibility of proving to others that they are worthy individuals despite their disability. This is related to the reconstruction of the social image of a disabled person, which becomes transformed through the sport activity. In this light, sport enables a disabled person to be presented as a strong, courageous, self-reliant individual, therefore negating the broad and stereotypical perception of people with various dysfunctions by the remaining part of the society. Through their actions, a dysfunctional person breaks with the previous image of a disabled individual, which is often connected with negative features including, among others, helplessness, dependability, or reliance on others.

You know, it's fun when people who watch me say afterwards, "Wow, it was great, I didn't know you could do that." Then, I feel that I have proved that the disabled can do much more than many people think. [Ben, a disabled person with a defective motor organ]

Thanks to practicing sport and the possibility of healthy people observing the actions of the disabled, the image of a disabled individual—previously ascribed with various, usually negative features through repeated stereotypes—is somehow dismantled. Physical activity in the case of the disabled means not only caring about the improvement of their conditions and general health condition but it also leads to overcoming barriers, both those connected with their own body and psyche and, what is more important, with social stereotypes and prejudices.

This is related to all categories of disabled individuals involved in various sport activities. On the one hand, it includes people who practice extreme sports, who, through spectacular victories within the international arena, propagate sport of the disabled and show them in a manner that is completely different from the consolidated stereotypes. On the other hand, there are also those who practice sport as amateurs, due to improvement of their physical, mental, and social condition, often start their society-oriented activity which consists in promoting their environment and disabled people in general. Therefore, it needs to be assumed that every kind of sport has a potential which may be used in the effective prevention of social exclusion and marginalization of the disabled.

## **Transformations in One's Subjectivity and the Sense of Self**

The third aspect of sports activities of the disabled, relating to the improvement in their quality of life, is connected with regaining the feeling that they are treated as a subject in relationships with others. In regaining the feeling of subjectivity, a significant role is played by the perception of a disabled individual through the prism of their active lifestyle, and the observation of developing perspectives and possibilities of realizing various life plans. In this context, sport supports a disabled individual in both the process of reconstructing the image of self and identifying oneself in new conditions arising from the experienced dysfunction. Hence, it is about noticing the assets of sport, and using them to prove to oneself and to others that living the life of a disabled person may be meaningful and may bring feelings of joy. It is both important and hard to achieve because it also means overcoming and challenging social stereotypes, according to which a disabled person is passive, demanding, and unhappy. However, it, first of all, transfers the load in the set of definitions of the self from a disabled person to perceiving the self as a sportsman (which is actually a social synonym of capability). In this context, there is a possibility to distinguish the ego at the "I" level (subjective I) and at the "me" level (objective "me"). The differentiation of the two aspects of the ego, introduced by Mead, means that, in the first case, we deal with a reaction to the attitudes of others, and they are impulsive and creative forces hidden within the individual responsible for the picture of the self. The second case refers to an organized collection of attitudes towards the individual, which is shaped on the basis of how we are

seen by others, and what they expect from us (Mead 1934). As a result, the reconstruction at the “I” level takes place, which consists in proving to themselves that disability should not be unambiguously associated with tragedy. In this process, the key meaning is played by sport, which provides an array of justifications that confirm the position.

Sport plays a really significant role in my life. To tell you the truth, I think I'd be a completely different person if it wasn't for sport, um...meaning, a weaker one, more withdrawn and susceptible to the views of other people. Sport taught me how to be self-confident, I became more sociable, and I'm not afraid of others, which used to make my life much harder. [Ralf, a disabled person practicing sport]

Together with the improvement of the physical condition of the disabled, a slow transformation at the level of their ego takes place. Disabled people, thanks to practicing sport and observing the changes in their body, gain a greater feeling of self-control and, most importantly, the belief that they are able to break other barriers. All positive experiences related to practicing sport by a disabled person strengthen their belief in the growing potential to act and use their body effectively, which, as a consequence, allows them to reproduce a positive self-evaluation. This, in turn, means that other mental barriers, which burdened the individual no less than the physical limitation, making it impossible to take up other life activities, are gone.

Well, sport gives me much more than just the fact of the improvement of my condition. To tell you the

truth, I feel much better thanks to it, in a mental respect. I have more power to live. If I manage to do something here, at training, I feel that everything else will also succeed, and it will be OK. [Anna, a disabled person in a wheelchair]

Therefore, sport is not just a physical strengthening of the body. First of all, sport is a source of transformation at the level of how disabled people perceive themselves. Such a transformation may, on the one hand, result from the changes with the body and its improving fitness observed by the individual, but, on the other hand, it may also be connected with the increasing awareness of a given person regarding the manner in which they are perceived by other people. In the first case, we deal with a situation when a disabled person, while experiencing their body, is able to point out the advantageous changes that have occurred in their body thanks to the sports activity. In the second case, it is about the individual's interpretation of signals that are sent out by other people, and which provide an answer to the changes that take place in the individual thanks to practicing sport. Such reactions of the environment are a very strong stimulus for the disabled person, strengthening their self-esteem, and providing a significant source in the process of rebuilding a positive image of themselves.

Right, I've already said that, for me, sport is space for discovering myself, the one I was, and because of that, in hindsight, I think I wasted a lot. Sport, and everything I achieve through sport, is all to do with physical strength, vital power, but also, or maybe essentially, contact with others, and what I believe is the



most important aspect, the possibility to see myself in a more reflective and possibly realistic manner than before. [Ralf, a disabled person practicing sport]

What is more, sport provides a possibility to compensate for losses related to the lost opportunities, or the necessity to change life plans and aspirations of a given person. In sport, an individual may find a substitute source of self-realization and the feeling of self-fulfillment. It is significant, especially when a person was active before they lost their full capability, and because of the dysfunction they cannot fully realize themselves in the manner that they had done before the event that caused the disability. The phenomenon may be related to situations that are completely unconnected with the individual's previous activity (e.g., work in the garden, horse riding, etc.), but it can also be a certain form of continuation in a slightly altered version of other forms of practicing sport. In the latter case, it is especially visible in the case of people who were previously focused on sport and often treated in a professional manner.

After the accident, I thought it was the end, that I shouldn't count on it, that, for me, sport was history. As an able-bodied person, I actually knew nothing about sport of the disabled. Who would think that sport of the disabled would be a place of my greatest successes in the future. [Alan, a disabled person with a defective motor organ]

Therefore, sport develops a feeling of self-esteem in the disabled. It supports the feeling of self-sufficiency in their life and the feeling of control in a manner they are keen to experience. It is especially significant in a situation when a person—having become

disabled—loses one's feeling of self-esteem, but also the sense for a future life, and that they are unable to control it from now on. In such situations, practicing sport, especially when it brings visible results in the form of the improvement of their physical condition, but also greater efficiency in dealing with various, also non-sport situations of everyday life, rebuilds their self-confidence, and is accompanied by moving from a fatalist to an active attitude.

## Conclusion

On the basis of the performed research and analysis of the collected material, it may be concluded that a disabled person who takes up physical activity starts to strive for an improvement in their physical condition and gets an opportunity to take part in actions of individuals with similar life problems. Therefore, the state of mind of an individual changes, as he/she starts to perceive oneself and the surrounding world differently. This process is accompanied by positive emotions, which are reflected in the whole life of the individual, strengthening them mentally through certain experiences which result from psycho-social processes. Looking from the perspective of an improvement in the quality of life of physically disabled people allows us to determine the importance of sports activity of an individual, as it adapts a special significance and becomes a source of attitudes, behaviors, and actions, both of the individual and other people, in various, also non-sport, contexts of everyday life. Sport may lead not only to physical and fitness changes but also to those referring to transformations in the manner of how the disabled perceive themselves. Sport is a form of rehabilitation of an individual which exerts a compre-

hensive and multi-dimensional influence, combining the progress of physical fitness and an increase in mental or social rewards.

Sport is, most of all, seen as an expansion and thus a continuation of the broadly understood concept of rehabilitation. But, sport is not only a physical but, first of all, a social activity. It happens as participation in various forms of physical activity, including sport, often adapts a form of organized actions. These actions are usually carried out in clubs, associations, foundations, and unions, et cetera, and this is where it has a more or less institutionalized character—which it conditions through formal (legal) requirements, but also with practical solutions related to the possibility of acquiring funds for the operation of such entities, among others.

The sport activity of the disabled, as a consequence, is of an institutionalized and group character. Therefore, participation of the disabled in organized forms of physical activity provides a basis for their consolidation around a given problem. Despite the fact that there are numerous differences related to the material situation, support from relatives, or social status, regardless of the differences of social, economic, or cultural habitus, the members of a group experience consolidation around a common physical activity, that is, practicing sport. A basis for such actions in the case of disabled individuals is the willingness to improve their shape, but also a possibility to establish and maintain interpersonal relationships with others, and hence to participate in social life to a greater extent.

Hence, participation in a given group is interconnected with adapting to the present rules, but also

internalizing particular values. Therefore, a disabled person becomes a part of this group, and this starts to play an increasingly important role in their lives. In this context, the notion of a *reference group* may also be applied, as a comparative scheme, in relation to which people make basic judgments and evaluations regarding their social position.

Along with the increase in the group's significance for a disabled individual, we deal with the gradual process of *taking up the role of a member*. During interactions, social actors strive to legitimize their role and confirm the role played by others. If successful, the role is a basis for further interactions between the individuals. This means that a given person gets the feeling, but also the belief that the activity, in this case, sport, undertaken in a group, provides a part of his/her social identification, also recognized by people from outside of the group. This influences the perception of self as a group member. As a result, a social bond emerges. It is assumed in interactive sociology that a social bond is a product of human interactions, and it is created and reconstructed permanently.

A group where a bond between its members emerges is a support environment, but also a *field of exchanging* and sharing everyday problems with others. Matters that can be dealt with within a group usually go far beyond the sphere of sport, referring to the aspects of personal hygiene or settling matters with various agendas and in different institutions, et cetera. Therefore, the group members obtain practical knowledge, which helps them in solving current problems regarding everyday life.

Taking up an action that includes practicing sports within a given group leads to a gradual change in how an individual perceives the surrounding reality. Such positive strengthening, created thanks to building group bonds, as well as possibilities to show the immediate environment that one is a functional unit, is, on the one hand, an important resource for implementing one's life plans, and, on the other hand, it supports *self-acceptance*. Within the group, the individual agrees on action plans, and permanently reinterprets the reality in interactions with its members.

Finally, repeated interaction with the same social actors, in the same situations, results in a *reconstruction of the definition of "self,"* both of themselves and of their partners, which is not limited to one par-

ticular situation. The process of acquiring identity by a social actor takes place during interactions where the anticipated visions of self, of the subject, are confirmed or modified, therefore affecting subsequent actions undertaken by the participants of the interaction. This is the basis on which a belief regarding both the individual and their partners is created, and which becomes significant in various aspects of the individual's life, including those outside the group.

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## Doing the Unknown: Spa Activities in Nursing Homes

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**Abstract** An ethnomethodological point of departure is that people rely on shared knowledge when mutually accomplishing everyday situations. Whereas most residents in a nursing home have a reasonable previous knowledge of events such as bingo or Christmas dinners, other activities such as pub evenings and spa activities are unfamiliar. Using ethnographic data from a Swedish nursing home with a “sport and spa” profile, this article investigates the challenges of arranging spa activities, an activity often unknown among residents. The findings show how residents’ lack of spa knowledge was found to cause problems, especially when they did not interpret the indexical expressions as intended. Where Garfinkel’s indexicality is predicated on actors being able to use shared knowledge, this study demonstrates that a lack of shared knowledge enables some actors to reshape the activity they wish to accomplish.

**Keywords** Indexicality; Nursing Home; Eldercare; Spa; Leisure Activity; Ethnomethodology

An ethnomethodological (Garfinkel 1967) point of departure is that people rely on shared knowledge when mutually accomplishing everyday situations: people in a workplace have a shared

understanding of what it means to hold a meeting; a couple in a bar have a shared understanding of what it means to be on a date. This article investigates situations of the opposite kind, that is, when some of the involved actors may lack a shared understanding of the situations that others try to accomplish.

In nursing homes, the residents’ social events do not happen by themselves, and generally need to be actively arranged by staff. Staff rely on residents’ ability to “make out what is meant” when they use presumably shared knowledge to accomplish activities and events. Staff members initiate excursions, bingo, quiz nights, and holiday celebrations, and it

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is the staff who decide what form they should take. While some activities are well-known to residents, others are less familiar or even unknown. For example, most residents of Swedish nursing homes know very well what to expect of an afternoon of bingo or a Christmas dinner, but they have far less experience with activities such as pub evenings and spa treatments.

Even though many people in Sweden have been to a spa or have tried spa treatments, spas are far less familiar to people who were born in the twenties and thirties. The mean age at which people move into a nursing home is 85 (National Board of Health and Welfare 2016), meaning that when they grew up it was unusual to visit spas, or indeed to socialize in pubs (another relatively recent phenomenon in Sweden). By arranging spa treatments and pub nights, nursing home staff are thus introducing activities that are potentially unknown to residents. It is to the obvious challenges in this that the present paper responds.

As part of the care provided for their increasingly frail residents, Swedish nursing homes are obliged to arrange a variety of leisure activities (National Board of Health and Welfare and SKL 2013). While the value of leisure activities in nursing homes is well-established (Cheung 1999; Phinney, Chaudhury, and O'Connor 2007), less is known about how they are collaboratively accomplished in practice. In recent years, Sweden has seen an emphasis on leisure activities for nursing home residents, marked by a growing fashion for thematic nursing homes, with profiles such as "gardening," "the arts," "culture and entertainment," or, as in the present ex-

ample, "sport and spa." At the same time, the general thresholds for obtaining a place in a Swedish nursing home have been raised, and as a result only those with significant care needs and/or dementia are admitted (National Board of Health and Welfare 2016). Researchers have concluded that residents in Swedish nursing homes can be regarded as being in "an early palliative phase" (Franklin, Ternstedt, and Nordenfelt 2006) and about one-third die within a year of admission (National Board of Health and Welfare 2016).

The manner in which leisure activities are accomplished in residential settings is of particular interest because staff members have to adjust their ethnomethods (Garfinkel 1967) to meet a number of challenges. A gym session in a nursing home bears only a passing resemblance to one in a real gym; a pub evening cannot be set up as if it were being held in a real pub; spa activities cannot be arranged as if they were in a real spa. There are several obstacles to the accomplishment of leisure activities in nursing homes: nursing homes are often strongly institutional in character; all types of activities usually have to be arranged in the same locale, such as in a communal dining room; residents are very frail and often require assistance with mobility; the main focus of staff members' expertise is to provide care, not to arrange bingo and spa treatments (Thorsell et al. 2010; Custers et al. 2011); and residents may have little or no knowledge of the activities accomplished, although this last might be considered more an opportunity than a challenge.

In spite of the challenges, nursing homes offer a wide range of leisure activities, with everything

from baking, traditional crayfish parties, and sing-a-longs to church services, gym sessions, and pub evenings. It is common to all these activities that they are arranged on the staff members' initiative, and when an activity is familiar to all those involved, the staff can rely on shared knowledge and thus can follow an established script (Goffman 1959). For instance, when staff bring out a bingo cage with its balls and cards, residents share their understanding of what is going to happen. The same is true when a priest appears in the communal dining room to set it up for a church service, or when staff lay the table for Christmas dinner or a crayfish party. In arranging such events, staff and residents alike can rely on the fact that it is common knowledge that there will be pickled herring and a ham for Christmas dinner, or that at a crayfish party they will eat crayfish and cheese, drink spirits, wear paper hats, and sing drinking songs. This can be contrasted with less familiar activities, when the lack of shared knowledge permits staff to arrange events that are "anything and everything." Spa activities are unfamiliar to many residents, at the same time as a growing number of Swedish nursing homes have an explicit sport and spa profile (Nilsson et al. 2018).

Whereas Garfinkel (1967) emphasized actors' ability to use common-sense knowledge, this article explores how a lack of such knowledge enables the "speaker" to broaden the description of the phenomenon. Drawing on ethnographic data from Seaview Lodge, a nursing home with a sport and spa profile, the aim of this article is to investigate how activities are accomplished that are potentially unknown to some of those involved.

## Leisure Activities in Nursing Home Settings

The previous research on leisure activities in nursing homes has largely focused on the kinds of activities that are offered and the outcomes in terms of improved health and well-being. Standard leisure activities include bingo, card games, embroidery, and watching television (Gubrium 1975; Svidén, Wikström, and Hjortsjö-Norberg 2002; Kracker et al. 2011; Michel et al. 2012), which are often described as favoring the preferences of female residents (Kracker et al. 2011). Several researchers have emphasized the need to individualize activities in order to increase residents' participation (Smith et al. 2009; Duffin 2012) and in recent years gardening—both outdoors (Nilsson 2009) and indoors (Tse 2010)—has received increased attention. Bingo and television have primarily been related to leisure, while gardening has often been framed as a form of therapeutic care (Tse 2010). Similarly, research on "cultural" activities, such as amateur dramatics or sing-a-longs, tends to focus on their therapeutic effect (Palo-Bengtsson, Winblad, and Ekman 1998; Kulturrådet 2013).

Research on the outcomes of such leisure activities has linked participation to increased happiness (Schreiner, Yamamoto, and Shiotani 2005), improved health and well-being (Subaşı and Hayran 2005; Thomas, O'Connell, and Gaskin 2013), and feelings of agency and identity (Saarnio et al. 2016), while other activities, such as dancing or playing mahjong, are associated with a reduction in depressive symptoms (Cheng et al. 2012; Vankova et al. 2014). Although there is a considerable literature on

a large variety of leisure activities and their benefits, little is known about how they are accomplished in practice, given the challenging setting of a nursing home. Previous research tends to treat leisure activities as a given—as “simply there”—and not something that requires thought and effort.

## Theoretical Approach

Inspired by Garfinkel’s (1967) ethnomethodological approach, the present paper looks at ethnomethods for accomplishing social phenomena. One such method is the use of indexical expressions (Garfinkel 1967:11). Garfinkel described indexical expressions as “an ongoing achievement of the organized activities of everyday matter,” and argued that the “intelligibility of what is said rests upon the hearer’s ability to make out what is meant from what is said according to methods which are tacitly relied on by both speaker and hearer” (Heritage 1984:144).

In a nursing home, a residents’ limited ability to “make out what is meant” may manifest itself as residents’ incomprehension of what staff members mean when they use scented candles and relaxing music to create a spa atmosphere. Yet an ethnomethodological approach does not mean that residents and staff are dismissed as “judgmental dopes” (Garfinkel 1967:68-69); they are not seen as governed by structures and expressions, but instead as using them as common knowledge, locally available and locally reproduced. The present paper thus focuses on the manner in which staff use indexical expressions—language, objects, and actions—in order to accomplish spa activities. While the residents’ lack of spa knowledge might be problematic, it can

also be an opportunity, for it allows staff to be innovative, devising their own creative versions of spa activities. One issue that falls outside the scope of the paper is whether there is a point at which such creativity becomes unethical. Given that some residents lack knowledge of an activity or phenomenon, can others exploit that to make it into whatever they want?

## Setting

The analysis draws on a wide range of data (described in detail in the next section) from a Swedish nursing home called Seaview Lodge. Seaview Lodge has a sport and spa profile, but in all other respects is an ordinary nursing home: a collective setting where very frail older people spend the last period of their lives. In international terms, Swedish nursing homes are of a high standard. Residents live in their own private one-bedroom flats with ensuite bathrooms and kitchenettes (National Board of Health and Welfare 2016), and they have extensive rights to self-determination, meaning that they can have visitors at any time, they can own pets, and they can smoke in their rooms if they wish.

Seaview Lodge is located in a large Swedish city and comprises a three-storey building with a total of fifty-three small flats off long corridors. The third floor is a dementia unit, excluded from the present study for ethical reasons. The first floor has eleven flats and a communal dining room, while the second floor has twenty flats, two dining rooms, and a “spa bathroom.” Also on the second floor is a large room that serves as a combined gym and pub, with a stationary bike at one end of the

room and a bar counter, television, and a seating area at the other.

As in all Swedish nursing homes, residents can, in theory, come and go as they wish, but in practice, very few of them are able to leave without assistance. Consequently, Seaview Lodge's residents spend much of their time indoors, either in their flats or in the communal living spaces. In good weather, they sometimes sit outside on the large balcony or in the courtyard. Twice a week there is a two-hour excursion in a handicap-friendly minibus which can carry up to six residents, and once a week or so residents can go for individual walks accompanied by staff members. Going for a walk generally means a staff member pushing a resident in a wheelchair, but sometimes they can go out on a specialized tandem bicycle with a staff member pedaling. Though Seaview Lodge bears similarities to one of Goffman's (1961) total institutions in the way that residents eat, sleep, and socialize in the same place, it is more like a "permeable institution" (Quirk, Lelliott, and Seale 2006) in the way that visitors and residents can come and go at any time.

At first glance, Seaview Lodge's sport and spa profile is not much in evidence. True, it is explicitly articulated on the nursing home's website, and on every floor there is a notice board with schedules for "spa activities" and the like, but despite these and other explicit expressions (such as spa signs on doors), a majority of the residents, when asked, were unaware of their nursing home's chosen profile. When asked to elaborate on their views of the profile, they often explained that they did not know about it, and that they did not know what a spa was.

## Method and Data

The data comprise ethnographic observations, interviews with residents and staff members, and fieldwork photographs, complemented with images downloaded from Seaview Lodge's official Instagram account. During observations and interviews, I relied on techniques developed in previous fieldwork in nursing home contexts (Harnett 2010; 2014; Harnett and Jönson 2016; 2017). For example, I often took the role of institutional "novice" (Wästerfors 2011) and was therefore presented with explanatory accounts ("We do this because..."). Accounts of this kind provide a rich material on the accomplishment of spa activities. Some Seaview Lodge staff members initially treated me as if I was evaluating their work, but this misconception gradually faded, and staff and residents seemed to have little interest in my note-taking, or at least seemed to ignore it.

I conducted observations on twenty occasions, each lasting between two and four hours (sixty hours in total), on different days of the week and at different times of day. I also conducted thirteen semi-structured interviews, 20 to 60 minutes in length (six shorter interviews with residents, seven longer interviews with staff), designed to discuss everyday life and gauge their indexical expressions and opinions on the nursing home's sport and spa profile. In addition, I conducted a number of brief "active interviews" in the field (Holstein and Gubrium 1995), when staff and residents were able to articulate what they were doing at that particular moment.

The observations took place between 9 a.m. and 4 p.m. on weekdays, with the exception of one

Saturday afternoon. The choice of time and day for the fieldwork was determined by my interest in Seaview Lodge's spa-related activities, none of which were scheduled for in the evening. I was the only researcher in the field except for four occasions when I was joined by two co-researchers, allowing me to discuss my interpretations of situations that we had jointly observed. During fieldwork, I mostly sat in one of the communal areas, which also served as a dining room, and since I did not have any "backstage region" (Goffman 1959) to withdraw to, I spent a lot of time chatting with residents or watching television with them. I soon found that while it was easy to identify the "sport" element of Seaview Lodge's sport and spa profile, the "spa" element was more difficult to pinpoint. Thus, I concentrated on noting down sequences of everyday life, being particularly alert to situations when the sport and spa profile was in evidence, such as when the schedule explicitly stated that a spa activity would take place. When the staff organized formal activities, I sometimes joined in, and thus I took part in a range of activities, including zumba sentao (seated zumba) and other workout classes, bus excursions, balloon tennis, "Friday dancing," sewing sessions, and a crayfish party. I also observed more mundane activities such as bingo, quizzes, manicures, hand massages, relaxation sessions, and television-watching.

When writing my field notes, I sought to follow Emerson, Fretz, and Shaw's advice (2011) by capturing "scenes" of people interacting and doing things in their everyday lives in Seaview Lodge, with a special eye to the collaborative accomplish-

ment of spa activities. This meant that I did not set out to observe and document everything that went on in the nursing home, but rather I focused on shorter interactions with indexical expressions related to the spa theme. In addition to my field notes, I also took photos and downloaded publicly available images posted on Seaview Lodge's Instagram account. The Instagram photos, being published on a platform controlled by the staff, were interpreted as confirmative tools (Carlstedt forthcoming)—a means by which staff gave activities a frame (Goffman 1959) and shaped how their audience would interpret different activities, as when they posted photos of residents in face packs and explicitly described it as a spa activity.

### **Ethical Considerations**

All residents and staff were provided with written and verbal information about the purpose of the project. They were informed that participation was voluntary and that data would be coded for anonymity and stored in a secure manner. Written or verbal consent was obtained from all participants. The two nursing home units included in the study are not dementia units, but nevertheless some of the residents might have had cognitive limitations. The project was approved by the regional ethics review board in Lund (Dnr 2015/864). Names and places have been omitted or changed.

### **Results**

At Seaview Lodge, spa situations were shaped both by staff members' creativity and residents' spa



knowledge. Residents sometimes used their knowledge to challenge staff members' attempts to provide massages or face treatments by pointing out that "This is not how it's done at a real spa," while the residents' lack of knowledge enabled staff to be creative and do pretty much what they wanted and still call it a spa activity. There were also occasions when residents' lack of knowledge posed a challenge. This happened when they did not interpret indexical expressions as intended, for instance, by not reading scented candles and soft music as an indication that a spa activity was going to take place. Generally, such indexical expressions were characterized by fragility, and in response, some spa activities were excessively indexed, as if staff wanted to ensure that residents or some other audience would read the situation as a spa activity. The analysis revealed that spa activities were accomplished through three analytically distinguishable indexical expressions: 1) fragile indexations; 2) excessive indexations; and 3) creative indexations.

### **Fragile Indexations**

Fragile indexations were characterized by uncertainty as to the kind of activity at hand. The way staff members dealt with this uncertainty included attempts to strengthen the indexation and anticipate potential disturbances.

One of the key challenges when arranging spa activities at Seaview Lodge was that the staff members' main task was to provide care, medication, and food, while the job of "real" spa staff is to provide customers with a spa experience. Another challenge was that many of Seaview Lodge's residents either

did not understand the purpose of the spa activities or were not interested in participating. In "real" spas, beauty therapists rarely have to struggle to persuade customers to undergo spa treatments, but in Seaview Lodge this scenario was common. Spa activities were scheduled every Tuesday morning (although they were held at other times too), hence the following excerpt from when Susanne, a staff member, was in charge of arranging spa activities for a rather reluctant group of residents:

It's Tuesday morning just after 10 a.m. and some residents are in their rooms, and some are sitting in the kitchen and have just had their breakfast. Susanne, a staff member, approaches Laura, a resident, and says:

— Laura, do you want us to do your nails? Kind of do them up?

Laura looks down at her nails, but does not seem keen on the idea. Her nails are perfectly done with shiny pink nail polish. Susanne seems to sense Laura's hesitation and asks:

— Or maybe that's not necessary? We can just do some hand massage.

Susanne goes to the corner of the room, turns off the television, switches on the stereo, and puts on some American Christmas carols. Then she says:

— Now, time to get titivating!

Susanne walks around the dining room using an electric lighter to light the candles on the tables. Then she goes down the corridor and comes back with a large plastic container filled with cotton-wool pads and manicure products. She turns to Inez, a resident who is sitting on the sofa:

— Inez, do you want to come now so we can have a cozy time?

Inez gets up from the sofa and walks to the table, where Karla and Laura are already sitting.

— Karla, would you like some juice? A little, perhaps? asks Susanne. Inez, should we begin with some relaxation?

— No, no need, replies Inez.

— Maybe the rest of us would like some, says Susanne.

At this point they are interrupted by a group of three people from another floor who enter the dining room with a large trolley loaded with rubbish and recycling. The group has to use the door just behind the table in order to get out to the back yard where the recycling station is located.

—There's no point in us trying to start before they're done. We know they'll be back, says Susanne, referring to the group with the recycling.

— Karla, don't you want some nail polish? Susanne asks.

— No, says Karla.

— But, you're sitting here with us.

— I have no choice, says Karla.

The staff-resident interactions in this excerpt illustrated how the accomplishment of a spa theme was indeed dependent on the success of a collaborative effort. Susanne continuously invited residents to work together to accomplish activities such as hand massages and painting their nails, but the residents expressed little interest. Before Susanne began her attempts to do residents' nails, she had used several indexations as she set the spa scene in the dining room. First, the notice board in the hallway announced that it was time for spa activities. Just before 10 a.m. Susanne turned off the television in the dining room, put

on some soft music, lit the candles on the tables, and brought out a large box of manicure products. However, the first obstacle arose when residents did not want to have their nails done (many already had perfectly painted nails). Susanne repeatedly reminded residents that they were going to "have a cozy time," and served them fruit juice while they waited around the table. When no one seemed interested in having their nails done, Susanne tried a new tack and offered them hand massages and relaxation while sitting together in the dining room. The situation was characterized by ambivalence about what was going on. Susanne and the little group of residents were sitting just outside the kitchen, so there was a great deal of noise and clatter from other staff members talking and doing dishes. The physical environment, the noise from the kitchen, and the people taking out the recycling tended to undermine the ongoing spa indexation and exposed its essential fragility. This fragility was only compounded by the fact that the room was very noisy and not especially relaxing, the residents were reluctant to participate, the member of staff was hesitant about what to attempt, and the session was disturbed by people carrying recycling through the room. Yet Susanne held the relaxation session regardless, issuing instructions such as "Breathe in, breathe out" and "Now your eyelids are growing heavy." After ten minutes the session was over and one resident had fallen asleep. Susanne turned to a resident and asked:

— You, then, Elisabeth. Did you relax?

— Not in the least, says Elisabeth.

— Yes, that was really nice, says Alice.

Whereas Elisabeth's statement highlighted the tenuousness of defining this as a relaxation session, Alice, another resident, strengthened it by saying it felt "really nice." Alice's comment served to evaluate and give credibility to the activity as a relaxation session, which was what the member of staff had strived to accomplish.

On several occasions I observed situations when residents received manicures and hand massages without protests, and even though the link between beauty treatments and spas is well-known (Yaman, Alias, and Ishak 2012) staff were still at pains to point out why painting nails should be classified as a spa activity:

**Kelly (staff member):** A spa, we have that too, sometimes everyone together, sometimes just one floor, when we do manicures, pedicures, face packs and creams, and curl their hair; when they can really feel good, with candlelight and nice drinks and so on. And that is the spa bit. And a spa can also be, for example, in the afternoon or the evening, when it's quiet—the ladies think it's pleasant to sit around the table and paint their nails and such. That's also a sort of spa. We have the sensory room on the third floor too. We have a small spa room here on the second floor, with nail polish and face creams and nail files and such.

Kelly apparently perceived the fragility of using nail painting as a spa indexation, and sought to strengthen its indexation by stressing that it "is also a sort of spa." Her comments anticipated potential disputes about the spa component, which seems to be more evident when *the whole building*

were doing things together than when the staff painted a few residents' nails in the evening. When she talked about spa events, she emphasized that they were not only a time when residents had *a chance to feel beautiful* but also an occasion for candlelight and nice drinks. Kelly's remarks illustrate how staff often provided accounts (Scott and Lyman 1968) for the spa connection as a method of anticipating and dealing with a sense of hesitation on the part of all involved. This hesitation was often implicit, but sometimes, when interviewed, residents explicitly challenged the credibility of the spa indexations. These challenges could take the form of residents pointing out how activities at Seaview Lodge differed from those at a real spa. At a real spa, treatments are given in special rooms by trained beauty professionals, but in Seaview Lodge treatments were given in the dining room by the nursing home staff. The residents' questions could cause disturbances, such as when Clary, a resident, described her most recent facial:

**Tove (interviewer):** What did you have done?

**Clary (resident):** A massage. A facial.

**Tove:** A facial too? Can you tell me about it?

**Clary:** They put a face pack on you.

**Tove:** Yes, they put a face pack on you.

**Clary:** And rubbed it in too.

**Tove:** Who did it?

**Clary:** One of the staff upstairs.

**Tove:** When you went for your facial, did it feel like you were in salon or...

**Clary:** [Laughs] Nope, not in the least.

**Tove:** Why not?

**Clary:** Well, it was staff from here.

**Tove:** It was staff, yes, but did it feel to you like you were at a spa of some sort?

**Clary:** I couldn't say.

**Tove:** So where were you? Were you upstairs in the bathroom on the second floor?

**Clary:** In the room on the second floor.

**Tove:** So, in the dining room?

**Clary:** Yes.

Clary began to laugh when I asked her if it felt as if she were at a beauty parlor when she had her face pack, and she explained that it had been done by "the staff from here" in the dining room, not by a trained beauty therapist. Even when activities were arranged in the so-called "spa bathroom," residents could invoke the nursing home context, which again threatened the indexation. This became evident when I talked to Betty, a resident, about the spa bathroom:

**Tove (interviewer):** Down the corridor on the right. Past the dining room. Then there's a spa, a bath...

**Betty (resident):** They call it a bathroom now. Have they put in a bathtub? Before you mostly sat and... they take a patient down there when someone has the time, and they get to relax completely and lie down. And then they sit there and fiddle about massaging and suchlike. But, you can't see when it's all dark.

**Tove:** What do you think of it?

**Betty:** Oh, it's not for me at my age...

Betty ridiculed the spa bathroom and the activities staged there. She explained that "They call it a bathroom now," as if it were not a real bathroom in her mind. She talks about massages in a similar way, by describing how staff "fiddle about massaging and suchlike."

While Betty's comments illustrated how spa indexations could be challenged by residents' spa knowledge, the opposite was also true, since their lack of knowledge constituted a challenge. This was plain from small talk with residents whenever I introduced the topic of my research. Rather than talk about the nursing home's sport and spa profile, residents invariably asked me questions, and especially whether I could explain what a spa was. This led to convoluted discussions, as when I found myself explaining to one resident why I was interested in the sport and spa theme:

**Alice (resident):** What does that word you just said mean?

**Tove:** Sport and spa?

**Alice:** Sport. That's soccer and stuff. Running.

**Tove:** And spa.

**Alice:** What's that? The people who win?

I sit down with Alice. She says that she has a dry throat and needs a drink. I turn to a member of staff who is standing off to one side and ask:

**Tove:** How should I explain the spa?

**Member of staff:** [Irritated] Well-being from the inside out.

The staff member was clearly irritated by my question and answered with one sentence: "Well-being from the inside out." This sequence illustrated how the lack of shared spa knowledge not only made the accomplishment of spa activities fragile but could also undermine the legitimacy of having a spa theme in the first place in such a setting. If the residents do not know what a spa is, there is a risk that a spa profile becomes little more than an act, or even a Potemkin village.



## Excessive Indexations

Although most indexical expressions were fragile, there were also spa activities that were accomplished using excessive indexical expressions, which left little doubt about how to interpret the situation. In a real spa, such an abundance of spa indexations would probably appear comical and unnecessary, and a “Spa bathroom” sign would seem downright odd. In Seaview Lodge, however, spa signs provided guidance for how residents should understand a particular room. An example of an excessive indexical expression was when staff members arranged a table with an abundance of spa-related objects, such as face packs, chocolate, candles, nail polish, hair dye, potpourri, et cetera. Even though it is very unlikely such a collection would appear in a real spa, in the Seaview Lodge setting it was a tool for indexing “spa.”

Excessive spa indexations were observed during fieldwork, and also in photos taken by staff and published on the Seaview Lodge Instagram account. This account served as the nursing home’s front stage (Goffman 1967), where staff posted photos and text that anyone could see. When spa activities took place, they were often a bit “messy”: residents did not always seem to understand what was going on, and spa activities were occasionally disturbed by other activities going on simultaneously, such as someone vacuuming. When spa activities were displayed on the Instagram account, however, this messiness was gone. One example of how staff could realize the spa theme this way was a post about residents having face packs, posted together with a photo of snacks, candles, and an abundance of beauty products.

**Figure 1. A Seaview Lodge Instagram post announcing “Today we celebrate our women on International Women’s Day by giving them some spa treatments!”**



Four of the photos show women with face packs, the fifth a table with a candle, peeling gloves, hair curlers, a curling iron, bowls of crisps and chocolates, nail polish, cotton-wool pads, hair dye, and body lotion. To index spa solely with some hair spray or a bowl of crisps would be fragile in the extreme, but by putting a large number of objects together a more solid spa-ness is created. The excessive indexical expressions, in combination with an Instagram text that explicitly described them as spa treatments, spelt out what kind of situation was in mind.

In most situations when staff tried to accomplish spa activities, male residents were noticeable by their absence. This gendering was also plain in the Instagram account—only one male resident is visible in the example shown here, asleep in his wheelchair in the background. At Seaview Lodge, as in all Swedish nursing homes, the majority of residents are women, and in the



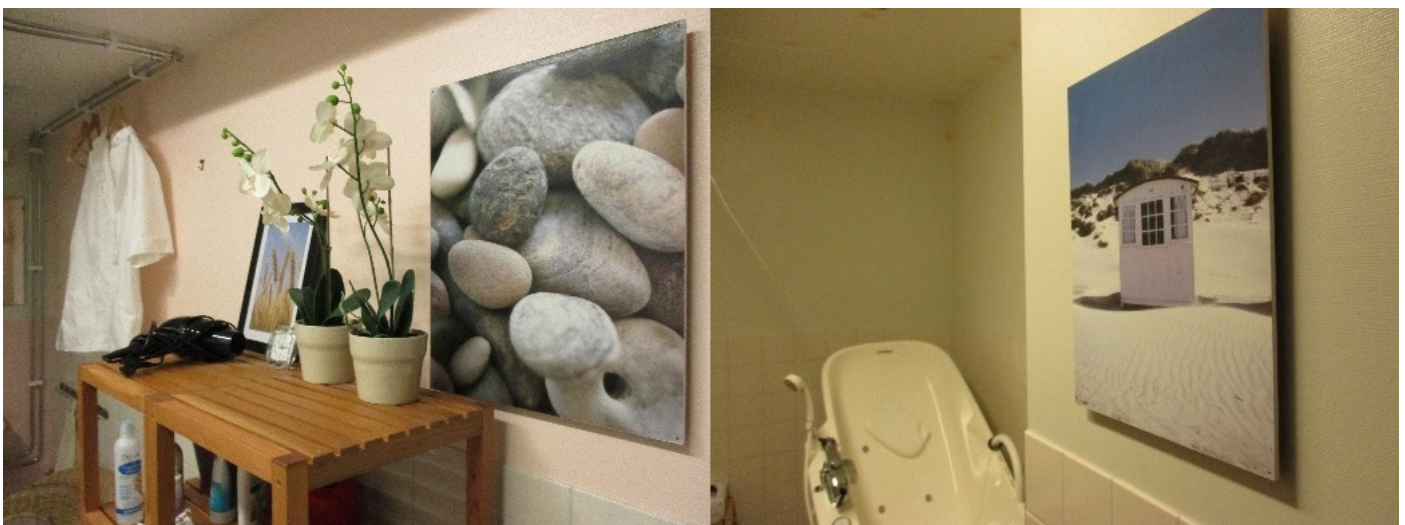
collaborative accomplishment of a spa theme, the male residents were at times disconcerting. Activities related to health and body maintenance are traditionally considered female (Little 2013), and the spa theme thus had two main drawbacks: the presence of men could hinder the accomplishment of a theme, which was in part accomplished with feminine-coded face packs and manicures; and the spa theme could cast doubt on the masculinity of the men living there (cf. Moss and Moss 2007). However, it is possible that the gendered aspect of the spa theme was cancelled out by the sport element in Seaview Lodge's profile.

As shown in the Instagram photos, objects were common parts in excessive spa indexations. Objects served to strengthen the spa connection in several ways at Seaview Lodge, both to emphasize the spanness of certain activities, but also to accentuate the overall spa-profile inside the facility. Spa signs and pictures with marine motives on the walls served to strengthen the spa connection, as described by Jennie, a member of staff:

**Jennie:** And then there are lots of nature photos. Well, that's the spa thing going on. And then, if you do have a spa room, there are so many classic spa pictures, with some seaweed and water droplets or whatever...I like this nature thing, there's a big ocean theme going. Seagulls on a jetty and a lighthouse and so on, and the photos were taken around here too.

Jennie used the term "classic spa pictures" when she went into the dining room to show me a picture of a seagull sitting on a jetty. The interpretation crucially depends on the viewer's knowledge of the context in which the picture of the seagull is situated. In a sailing club, it would be unlikely to serve as an indexical expression of a spa. At Seaview Lodge, however, pictures with marine themes were found in corridors, dining rooms, and in the spa bathroom. The spa bathroom was a large room with a bathtub designed for persons with disabilities, and a table with two plastic orchids. The walls were decorated with three photographs: one of reeds, one of pebbles, and one of a beach hut.

**Figure 2. Fieldwork photos of the spa bathroom. A white robe hangs to the left of the table with the plastic orchids and the photos of reeds and pebbles, while over the bathtub hangs a photo of a beach hut.**



In the corner of the spa bathroom hung a white robe for staff to wear during spa treatments. In spa settings, white clothing is associated with *professionalism, hygiene, health, and the “effect” of the treatment* (Klepp 2009), but in nursing homes, it represents something entirely different. As early as the seventies, American nursing homes were requiring staff to wear colored uniforms in order to achieve a more homely atmosphere (Gubrium 1975), and in Swedish nursing homes, staff also tend to wear colored work clothes (or even private clothes) as an indexical expression for “homeliness” (Stranz and Sörensdotter 2016), while white uniforms have become associated with hospitals and institutions. At Seaview Lodge, however, the white robe in the spa bathroom was used as an indexical spa expression, and it was worn when staff gave residents foot treatments, for example. It remains uncertain whether the residents had sufficient shared spa knowledge to make sense of this.

The spa bathroom at Seaview Lodge was very rarely used for treatments or baths, and staff sometimes used it for storage (on my first day of fieldwork, it contained a shopping trolley and some other bits and pieces crammed in next to the bathtub). Despite this, the excessive indexical expressions in the shape of the white robe, the spa sign on the door, the orchids, and the photos on the wall were a clear indication of how the room and its uses were to be understood.

The spa sign on the door included two tea lights in green candleholders and two white flowers resting on water. Unusually, though, the sign was placed on the *inside* of the door, as if to ensure

that residents inside the room knew that they were in a spa bathroom and not in an ordinary bathroom.

**Figure 3. Fieldwork photo of the sign on the inside of the spa bathroom door that informs anyone using the room that it is a spa.**



Tea lights and candles were commonly used as an indexical expression in Seaview Lodge, as the spa door sign showed. There were small battery-operated tea lights and wax candles in the dining rooms. Candles also featured on various signs, such as the spa bathroom sign and the staff toilet sign. Indeed, the staff toilet sign pictured not only a candle but also a white rolled-up towel, aromatherapy bottles, a white flower, and a text announcing it to be a “Toilet and Mini Spa.” Inside were a toilet, a washbasin, and a small shelf with cleaning products, toilet paper, and a bowl with potpourri. These indexical expressions were clearly not for residents, but an example of how staff accomplished the spa theme in areas only they accessed.



Figure 4. Fieldwork photos of the sign on the staff “Toilet and Mini Spa” and the layout of the room in question.



Whereas the use of the staff “mini spa” was reserved exclusively for staff and visitors, manicures were limited to residents only. For reasons of hygiene, staff were prohibited from wearing nail varnish, but it was common for residents to paint their nails, and some of the women had extravagantly decorated nails with glitter or rhinestones glued on. This too was sometimes part of the excessive indexical expressions, as shown by an Instagram post that announced: “Beautiful nails à la glitter and glamour at Seaview Lodge.” The photo shows the hands of five residents together with a photo of a variety of colored nail polishes, nail clippers, nail files, and a candle in a pink candle holder.

Figure 5. Seaview Lodge Instagram post announcing “Beautiful nails à la glitter and glamour at Seaview Lodge.” The photo on the bottom right shows the manicure products and candle.



As with the Instagram post about face packs, only residents' hands are visible in the photos. By describing the activity in terms of "glitter and glamour," life at Seaview Lodge is contrasted to traditional images of nursing homes, which are typically associated with boredom, decline, and death (Gubrium 1975; Hicks 2000; Whitaker 2004; Carlstedt forthcoming). The distance from such grey ordinariness was something that characterized indexical expressions for spa in general. Staff members' attempts to accomplish spa activities were perhaps their way of showing that "we are going that extra mile" and "you can go to a spa even when you are old and frail." Some residents certainly understood their efforts in this way, whereas others did not even notice them, or thought them unnecessary, irrelevant, or unsuitable for older persons.

### Creative Indexations

Manicures, massages, and beauty treatments all have a strong affinity with standard spa treatments, but occasionally the staff at Seaview Lodge used indexical expressions with only vague spa connotations. The residents' lack of shared spa knowledge enabled staff to take things far beyond the general notion of what a spa is, so that activities such as drinking orange juice were explicitly linked to the spa theme. Plainly, actors *with* knowledge (the staff) were able to do almost anything and call it a spa activity.

One such example was the association of spas with the senses, especially touch, taste, and smell. During my observations at Seaview Lodge, food and drinks were often part of the spa indexations, and when staff mixed fruit juice with yoghurt, they

called it a "health drink." Linda, a member of staff, explained that many of her colleagues were health conscious and drew on their healthy lifestyles to accomplish the spa theme:

**Linda:** So we're now talking about buying a juicer, as I think the staff will be all for it, at least in my unit here, so, there's a real awareness today, many people are making their own juices and drinking their own detox mixes and stuff. There's a lot of it about, that's what health is today; that's how many people live. That can be a bit of a spa too.

Linda finished her remarks about juicing by clarifying that "that can be a bit of a spa." Such a statement indicates a fragile indexicality that needs to be strengthened by underlining the link between a juice press and a spa. As Linda continued, she emphasized the value of getting residents to touch and hold root vegetables:

**Linda:** And to get the older people to join in, just to sit and hold the root vegetables and such, ginger and old beetroots or whatever you're using. It's like they no longer get to do that anymore; their food arrives all ready to eat.

**Tove:** Yes.

**Linda:** And then to join in and make different juices, to taste them. That's when you involve really all the senses. Touch and scent and taste and pleasure, and I think that has a bit of a spa feel to it, when you engage the senses. So everything can have a sport and spa angle to it.

The fact that holding a beetroot can be an indexical expression of a spa illustrates how a concept can be

defined not by fixed attributes, but by reference to distant family resemblances (Heritage 1984). Beetroot-holding is described in terms of sensitivity, and enjoyment—sensations with a family resemblance to those invoked by a spa. A professional spa would probably not use beetroots in this way, and it is questionable whether any actors outside Seaview Lodge would consider beetroot-touching an indexical expression for a spa activity. Inside the nursing home, however, the absence of shared spa knowledge paved the way for this kind of creative indexicality. Garfinkel's original version of indexicality emphasized actors' ability to use common-sense knowledge, but here we see that Linda's claim confirms that a lack of such knowledge on the part of the "hearer" enables the "speaker" to broaden the description of the phenomenon.

## Conclusions

The present paper uses spa activities as an example of how activities are accomplished when some of the involved actors may lack a shared understanding of what others try to accomplish. Nursing homes are places where residents are unable to undertake everyday activities on their own, and are therefore dependent on staff and *their* versions of activities. Members' actions at Seaview Lodge were simultaneously "context-shaping" and "context-shaped." The meaning of nail polish, a candle, or a beetroot relied wholly on its context, and the nursing home's sport and spa profile guided the interpretation of actions and objects alike.

The findings make a useful contribution to Garfinkel's theories of how people understand and produce

social order, by showing the course it takes when some lack the knowledge that most take for granted. Although relevant and important, the literature on nursing homes has treated their leisure activities as something that merely exists, not as something that actors can actively shape and accomplish.

The indexical expressions identified in the study offer a novel and fruitful method for studying nursing home activities. They are also shown to be fragile, excessive, or used in creative ways when some residents lacked shared knowledge of the activity at hand. The findings also contribute to a more specific understanding of spa activities in nursing homes. It was typical of indexical spa expressions that they were portrayed as something extra, in contrast to the usual boredom and decline of nursing home life. Spa activities were thus found to offer an ostensibly ideal mix of care activities and leisure activities. When staff provided massages, facials, and relaxation they were providing bodily care, but also leisure and luxury. What this study shows, though, is that there are both challenges and opportunities in accomplishing a theme about which residents know little. There is a risk that it becomes nothing more than a facade, leaving staff free to do whatever they like, such as getting residents to handle beetroot and calling it a spa experience. And yet the findings also show that the residents' lack of knowledge opens up for creative and locally adapted versions of a spa. Whereas Garfinkel's indexicality was predicated on actors' ability to use shared knowledge, the present study shows that a lack of such knowledge enables others to widen and reshape the phenomenon or activity to be accomplished.



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## **Shifting the Burden to Daughters: A Qualitative Examination of Population Policy, Labor Migration, and Filial Responsibility in Rural Bangladesh**

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**Abstract** This research examines the gendered consequences of the international low-fertility agenda, as it has been realized in an era of a globalized labor market, by documenting some of the ways that families in rural Bangladesh have shifted filial responsibilities between daughters and sons. Such shifts are occurring in a context of new demographic and economic realities that have been largely shaped by national policies and pressure from international organizations. Using qualitative interview data, this study examines how, in the context of declining family size, male labor migration, and increasing life expectancy, women and girls are expected to take on a larger share of filial responsibilities. While sons' responsibilities narrow to include economic contributions through wage earning and remittances, expectations for daughters are expanding and may include earning a wage, as well as caring for both natal and marital relatives. This paper also seeks to problematize the conflation of fertility decline, poverty reduction, and women's well-being by arguing that women's empowerment is not a natural result of smaller families.

**Keywords** Globalization; Development; Family; Gender; Fertility; Population Policy; Bangladesh

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This research demonstrates the gendered consequences of neoliberal development and family planning programs by documenting some of the ways that families in rural Bangladesh orient themselves around new demographic and economic realities; realities that have been largely shaped by national policies. These policies were implemented



over the last forty years by the Government of Bangladesh with support from influential international financial and non-governmental institutions such as the International Monetary Fund (IMF) and the World Bank. Economic research that analyzes women as a stand-alone or homogenous category has been insufficient for assessing the effects of economic and population policies on women and girls in the Global South. Rather than isolate women's status or experiences, this study contextualizes them by foregrounding kinship and family relationships. By doing so, the data presented make visible several local consequences of political and economic changes, and demonstrate how such change carries with it possibilities for perpetuating or deepening gender inequality.

Using care work and filial responsibility as sites for exploring social change, I examine the effects of simultaneous economic and demographic shifts in rural Bangladesh. I examine these shifts through women's perspectives on their current household and filial responsibilities and through parents' discussions of their future expectations for their sons and daughters. Data for this study were collected via household observations, informal conversations, and thirty semi-structured interviews with women in their homes. By focusing on care work and filial responsibility, I endeavor to achieve two goals. The first is to highlight state policies and economic ideologies as factors that shape family and gender relations in rural Bangladesh. The second is to document some of the ways that rural development, linked as it is to global economic change, perpetuates conditions of inequality under which people must renegotiate gender roles within the family.

## Background and Study Area

International organizations cite several recent changes in Bangladesh as evidence of the positive effects of economic development and modernization. These shifts include lower birth rates; increased access to formal education for girls; improvements in life expectancy for men and women; increasing remittance flows from abroad; and a reduced reliance on agriculture with the entrance of men and women into the wage labor system (Cleland et al. 1994; Ahmed 2004; IMF 2013; World Bank 2013; 2014).

This section includes a description of the study area and its connection to current demographic and economic policies. I first describe the Matlab study area in terms of typical patterns of marriage, residence, and care-giving within the family so that readers can better understand the local context in which social changes are occurring. Next, I present a discussion of the low-fertility agenda, locating this research in literature that documents the complexities of women's lived experiences of economic development and population control. This is followed by a brief description of two other policy-driven changes visible in the study area: (1) the out-migration of men who leave the village in search of work and (2) improvements in access to education for all children, but particularly for girls.

### Matlab Study Area

The study site for this research is Matlab, Bangladesh, a rural area about 100 kilometers southeast of the capital city, Dhaka. The area is home to approximately 200,000 people and consists of a few small

towns and approximately 140 villages (Bangladesh Bureau of Statistics 2010; ICDDR, B 2014).

Matlab is the site of a cholera hospital and population research center run by a large NGO, the International Center for Diarrheal Disease Research, Bangladesh (ICDDR, B), which has operated there since the 1960s. The Center has been instrumental in lowering fertility in Matlab over the last 30 years through education programs and ongoing home visits by health outreach workers who promote and offer contraception (Arends-Kuenning 2001). Their outreach activities are held up internationally as an example of a successful, non-coercive fertility reduction program (Cleland et al. 1994). Although fertility rates in most parts of Bangladesh did not begin to decline until the 1980s, rates in the Matlab study area began to decline earlier, from approximately 7 children per woman in the 1960s, dropping below 5 children by the end of the 1970s, to an average of 2.6 children per woman in 2012 (HDSU 2013).

Families in rural Bangladesh are structured such that adult sons and daughters have separate roles that serve distinct purposes in maintaining and reproducing the family. A multi-directional flow of care and resources exists in terms of financial and care-giving responsibilities exchanged between natal and marital households, parent and child generations, and sons and daughters. A majority of families practice patrilocal residence, arranged marriages, and patrilineal inheritance patterns; such family structures are temporally and spatially resilient. Still, the prevalence of normative family structures described here should not be understood as representing a static, “traditional” model of the family in Bangladesh.

The status position of sons in Bangladeshi families has historically been higher than that of daughters (Ahmed and Bould 2004; Kabeer, Huq, and Mahmud 2014). Family residence patterns are patrilocal, which means that boys and girls grow up in their father’s house surrounded by their mother and their paternal relatives. After marriage, sons stay in their natal household with their wives and, when possible, inherit land in their father’s *bari*<sup>1</sup> while married daughters move to their in-laws’ house. Although dowry has been illegal since the 1980s, the vast majority of marriages are still arranged by the bride’s and groom’s parents after they negotiate a dowry (Nasrin 2011).

Daughters-in-law who join the household are expected to take part in agricultural labor, to cook and complete household chores, and to be responsible for the hands-on care of children and elderly relatives. Typically, sons bear the burden of economic security for the family, whether that security is found in working family land, working others’ land in exchange for crops or wages, or performing wage-based labor in town or abroad. Sons are also responsible for shopping and business transactions that take place outside of the household. As work in the village becomes scarce and national policies favor sending men abroad for work, an increasing number of men now migrate to urban centers and abroad for wage-based jobs (Asfar 2009; HDSU 2013). Additionally, as parents have fewer children, it becomes more likely that they will have one son or no sons. This change in the number of children and the increased likelihood that parents will have only

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<sup>1</sup> A *bari* is a cluster of household buildings, usually around a central yard area and a shared kitchen/cooking space.

daughters affects residence and care work patterns in important ways.

### **The Low-Fertility Agenda in Rural Bangladesh**

Population control has been an integral part of the national policy agenda in Bangladesh since the early 1970s, with leaders identifying high population density and low income as major challenges to the new nation. Globally, population policies transitioned after the 1994 International Conference on Population and Development (ICPD) in Cairo (e.g., Richey 2003; Gulati 2005). Prior to the Cairo meeting, approaches focused on reducing fertility via family planning and access to contraception. Post-ICPD approaches are broader in scope. The language of post-ICPD policies demonstrates an attention to gender equity by focusing on girls' and women's health, reproductive health, and even women's empowerment; however, fertility control remains the end goal (Richey 2003; Kabeer 2015).

The low-fertility agenda is highly visible in rural Bangladesh. It is carried out on multiple platforms, including via slogans in the media, advertisements in public places, in children's lessons at school, during celebrations of International Women's Day, and through home visits by health outreach workers employed by governmental and non-governmental organizations. Outreach workers, most of whom are women, visit women of childbearing age to educate them about reproductive health, offer free contraception, and ask them direct questions about their reproductive decisions, sometimes pressuring them to curb their plans for more children. Efforts to control fertility in Bangladesh are a part of

broader national policy goals to relieve poverty and stimulate economic development (IMF 2013). People in the study area discuss fertility reduction as synonymous with ending rural poverty, empowering women, and bolstering development. The conflation of population control, women's empowerment, and development efforts is not unique to the study area; this pattern can be found around Bangladesh and in other countries (e.g., Richey 2003).

The work of well-known economist, Amartya Sen, is reflective of the connections people draw between fertility rates, development, and empowerment. Sen (1996; 1997) positions fertility decline as a solution to many social problems, achievable by empowering individual women, which he believed would, in turn, allow women to make decisions about their reproductive health. Sen (1996) champions cooperative, as opposed to coercive, approaches to fertility reduction as necessary to avoid global environmental crises and to reduce poverty, but he does so without questioning whether low fertility, poverty reduction, and women's empowerment are actually linked in lived experience.

Sen (1997:11) writes that, "One of the most important facts about fertility and family size is that the lives that are most battered by over-frequent childbirth are those of the women who bear the children." He continues this line of reasoning in "Gender Equity and the Population Problem," writing that, "Perhaps the most immediate adversity that is caused by a high rate of growth of population lies in the loss of freedom that young women suffer when they are shackled by persistent bearing and rearing of children" (Sen 2001:471).

Though others have demonstrated rapid fertility decline among the poor is achieved through state-level improvements that increase access to education and social services for everyone in the family (Birdsall and Griffin 1988), Sen (1997) uses the language of post-ICPD policymakers when he, instead, focuses on individual women's empowerment as the best tool for achieving low fertility. His arguments evade larger questions about poverty to purport that childbearing itself causes such suffering that, given more autonomy, young women will decide to have fewer children and their lives will consequently improve. Sen is devoted to the question of *how* we get to population control, never unpacking the assumption that decreasing fertility is automatically or inherently linked with women's well-being.

Research has shown the relationship between lower fertility and women's empowerment to be contextually complex (Simmons 1996; Head 2012). In her study of fertility and empowerment<sup>2</sup> using nationally-representative data from Bangladesh, Sara Head (2012) found no significant improvement in empowerment for women whose fertility rates were below the mean for their community. Head's (2012) findings indicate that women whose cumulative fertility matched the normative rates within their community tended to have the highest empowerment scores. This suggests that bearing the appropriate number of children remains a crucial component of women's value and status within the household and community.

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<sup>2</sup> In Head's study, empowerment is operationalized via four questions that measure women's household decision-making power.

In reality, efforts to decrease fertility have been motivated more by economic concerns than by considerations for women's well-being. The low-fertility agenda has been a long-standing feature of Bangladesh's economic adjustment. Economic and demographic goals are frequently combined in a comprehensive policy framework, outlined in a series of seven five-year plans created by the IMF and the Planning Commission of Bangladesh (IMF 2013; GED 2015). The assumption that curbing fertility is part of successful economic growth rests somewhat on the belief that nations need to dramatically decrease demands for social or welfare programs and increase the population's production potential (Kabeer 1994).

Feminist scholars have been documenting the myriad ways that economic development and fertility policies implemented in African, Latin American, Caribbean, and Asian countries produce new problems and magnify existing gender inequalities, particularly at the family level (Elson 1992; Kabeer 1994; Kibria 1995; Thomas-Emeagwali 1995; Lingam 2006; Connell 2014). Despite hopes that education, low fertility, and participation in the paid labor market would improve women's circumstances, research demonstrates that women who earn wages are often not in control of household resources and are still expected to carry the double burden of paid work and unpaid domestic labor (Elson 1992; Kibria 1995; Chowdhury 2010).

This research examines the family in the context of fertility reduction, labor migration, and other policy-driven shifts in rural Bangladesh in order to document how such shifts, which constitute part of the

development agenda, complicate women's family life and filial responsibilities. What follows is a description of two other aspects of development policy that, in addition to declining fertility, are sources of social change in the study area at present: the overseas export of male labor and the advancement of education for girls.

### **Male Labor Migration and Changes in Education**

The promotion of a domestic and international wage-based labor market is another component of development efforts in the study area. At the national level, the Government of Bangladesh and the IMF have been working to decrease employment in family agriculture, citing hopes to double the percent of the population employed in the industrial sector by 2021 (IMF 2013). Between 2000 and 2010, the number of families without land continued to rise while poverty rates decreased (World Bank 2013). This decoupling of poverty and landlessness is rooted in the move away from agricultural production towards wage-based labor and an increased reliance on remittance sending. Still, meeting the demand for wage-based jobs in rural areas has been difficult. To address this problem, the IMF set a related goal of increasing the rate of overseas employment of all skilled and semi-skilled Bangladeshi workers from the current rate of 35% to 50% by 2021 (IMF 2013). According to study area data collected in 2011, migration rates for men who are leaving villages in search of work in urban areas and abroad are moderate, but increasing among those aged 20-34 years (HDSU 2013). The male out-migration rate in 2011 was 15.2% of men aged 20-24 years, 12.7% of men 25-29 years, and 10.1% of men aged 30-34 years (HDSU 2013).

Changes in education represent another component of rural development. Since the 1990s, national policies have sought to increase accessibility of education for girls, as well as cultural acceptance of allowing them to attend school (Asadullah and Chaudhury 2009). The moderately successful Female Secondary School Stipend Project was developed to increase enrollment of rural girls, which would thereby delay their marriage and childbearing (Schurmann 2009). As the data below demonstrate, most parents I spoke to expect their daughters to complete at least some school.

### **Methods**

Data for this research come from household observations, informal conversations, and thirty semi-structured field interviews with women during the fall and winter of 2011. Field interviews were conducted as part of a larger dissertation project which was ethnographic in nature, taking place across two extended visits to Bangladesh in 2010 and 2011. The larger research project sought to understand recent changes in gender roles and family dynamics amid economic and demographic shifts in rural Bangladesh.

Qualitative methods are an important sociological tool for connecting macro-level changes with experiences at the micro or household level. Qualitative methods also have the potential to detect important changes in social norms and values before those changes are evident in quantitative or outcome-focused models.

The economic development and population policies I contend with in this study can be understood as



national strategies for opening the economy and merging national interests with global ones, referred to as globalization. As a macro-level phenomenon, globalization poses unique challenges to analyzing social and cultural change because it complicates traditional research parameters, such as the meanings of “local” and “field site.” Ethnographic interview research is well-suited for this challenge because it allows a fluidity and flexibility that can be used to interrogate the meanings of the research parameters alongside a pursuit of the research topic. The researcher can simultaneously interrogate policies from above alongside their varied effects on households below. Ethnographic methods are also well-suited for examining global forces because they rely on “being there” in a particular place to understand a particular aspect of social structure as grounded in lived experiences. “Being there” is the best starting point for understanding how global forces, including population policy and the global labor market, intersect with aspects of daily life such as gender roles and filial responsibility.

Another challenge lies in how globalization makes global-local linkages *appear* as though they are chaotic or uncoupled. In response, the ethnographer needs to rethink notions of “field” and boundaries around “place” and “group,” as these concepts are shifting. Sociologists Gille and O’Riain (2002:273) consider the problem of how we understand local spaces and meanings in the context of globalization, writing, “Ethnography is uniquely well-placed to deal with the challenges of studying social life under globalization because it does not rely on fixed and comparable units of analysis.” Likewise, in her introduction to *Constructing the Field*, Vered Amit

(2000) tells us that ethnographic practice is flexible and fluid; the ethnographer can make use of this flexibility and fluidity in order to rethink and re-imagine the meaning of local as it relates to the global.

This project examines households as local sites where global labor markets and population policies come to bear. Kabeer (1994) reminds us that experts, particularly economists, who prescribe development policies know very little about how households are organized in terms of marriage, parent-child relationships, and kinship, and so they have been largely incorrect in their predictions of how structural change would affect women’s lives. Noting this dearth of understanding, Lingam (2006:1997) calls for more research that “capture[s] the nuances of experiencing implications of public policies in private lives.” The qualitative field interviews presented here foreground family patterns of marriage, care, and kinship in order to make visible some of the ways that the global is embedded in the local.

In order to compare responses across generations, the interview sample was stratified to include at least ten women from three age categories: 20-34 years, 35-49 years, and 50-64 years. The sample was evenly divided between women from families where several men (i.e., three or more) had migrated for labor and women from families where no men had migrated. Women of any marital status—unmarried, married, widowed, divorced, and separated—were included in the sample. As part of ethnographic practice, field interviews often include observation and more informal conversation (Lamont and Swidler 2014). The semi-structured interviews

for this project took place in respondents' homes and lasted one to three hours. This was frequently followed by informal conversations either while walking around outside of the house or over tea and shared snacks inside.

Interviews were conducted by a pair of interviewers: one non-native, beginning Bangla speaker and one Bangladeshi, native/fluent Bangla speaker from Dhaka. With permission, all interviews were recorded using a digital voice recorder and later transcribed and translated into English for analysis. Analysis was based on the grounded theory approach, originally written down by Glaser and Strauss (1967), to understanding the themes that emerge from transcripts of the qualitative interviews. Transcripts were analyzed via open coding for ideas, topics, and going concerns that emerged from, or are grounded in, the data. Respondents' attitudes and beliefs about work, gender, health, marriage, *purdah*, education, and male labor out-migration were explored ethnologically, which compels the researcher to focus on local members' own meaning making processes (Garfinkel 1967) and their own everyday going concerns (Gubrium and Holstein 2000). Although analysis occurs iteratively at nearly every stage of a qualitative project, the bulk of coding and categorical analyses of interview transcripts was handled using NVivo 9 software.

## Changing Expectations for Sons and Daughters

As fertility decreases and labor migration becomes more common, sons are viewed as less reliable

sources of social support even though they remain reliable sources of economic security. Respondents indicate that daughters are not only expected to take on the household and family duties their brothers once held; they are also increasingly seen as potential sources of financial support, a potential that is tied to girls' recent widespread access to formal education. With few exceptions, respondents felt that people now expect more from their daughters while expectations for sons are either staying the same or decreasing. In what follows, I outline several ways that respondents discussed changes in their sons' and daughters' roles.

### Sons' Decreasing Responsibilities

The normative situation in the study area is that people expect the responsibility of caring for aging parents to fall to sons and the daughters-in-law they bring into the family through marriage. The kind of care sons provide is primarily articulated in terms of financial support, but also includes shopping for food, medicine, and clothing, major transactions like buying or selling property, burial and funeral arrangements for parents, and responsibilities towards their siblings, especially their sisters' children.

Men's labor migration has set limits on the kinds of support sons can provide to their families. Sons and husbands who are away for work cannot do much beyond making decisions over the mobile phone and sending money home. As evidenced by the growing number of women visible in the bazaar and in local shops and offices, women have begun to take on shopping and household business

responsibilities, duties that typically belong to men. In the conversation below, Tanjila jokes about the absence of men in the village.

**Interviewer:** Where do most of the people of this village work?

**Tanjila:** Most of them work either in Dhaka or abroad.

**Interviewer:** Most of the men moved outside for work.

**Tanjila:** Yes, you find only women here! [Laughing]

It was difficult to pinpoint how sons' roles have changed because women who thought sons were doing less compared to before were not always willing to articulate why or how sons' responsibilities have decreased. This was consistent with other responses women gave about their sons, including a reluctance to discuss any negative consequences of their labor migration. They did, however, communicate that general expectations for sons have narrowed to include financial support, concern for siblings, and their presence in arranging parents' burials. When asked about changes in sons' responsibilities, Himani focuses on financial support:

**Himani:** There are some sons who do things for their parents and some who do nothing for their parents. But, I think it [their responsibility] has generally gone up compared to before.

**Interviewer:** Tell me about the nature of this increase. What did they not do in the past, but are doing now?

**Himani:** They are doing many things now for their parents. In the past, poverty was in every family to some extent. Compared to that, they are doing more than before.

**Interviewer:** This means they provide better financial support for their parents?

**Himani:** Yes.

That sons are doing less is reflected in Mala's statement below.

I am seeing from all around. Sons don't do anything for their parents at all. They go abroad as soon as they get married. His wife sometimes does not give meals to his parents properly. So why should I be dependent on my son at all! It is natural maybe! Sometimes they [sons and daughters-in-law] behave well. Still, I am not going to depend on them.

By going abroad for work, her son supports her financially, but he and his wife are less reliable sources of the kinds of care work that require one to be present in the *bari*. Mala goes on to suggest that, in addition to their financial contribution, sons are important because burial remains their responsibility.

**Mala:** I have one brother-in-law who has only daughters. He doesn't have a son.

**Interviewer:** Does he worry about who will take care of him?

**Mala:** Yes. That's why I always ask him who will bury him when he dies!

Bina is a young mother with one son and two daughters. In the conversation below, Bina first tells us about the normative situation wherein sons take over as heads of household. Upon further reflection, she adjusts her response to reflect recent changes:

**Bina:** In our culture, sons take care of their parents. Sons take on the responsibilities of the family. Girls leave their father's house after they are married so they cannot usually take on responsibilities towards their family.

**Interviewer:** So [clarifying] sons take on the responsibility of the family. The girls cannot.

**Bina:** Actually [pauses to think], it's also a reality that girls were not educated before. Now, the question becomes which side she will manage: her parents' side or husband's side! Girls' education was not very common in the past. Now, the number of girls getting an education is increasing. If my daughter is educated and does some job to earn money, she can look after me; otherwise, how can she!

Not only does Bina make the point that daughters could be expected to earn and support their parents, she indicates that increased access to education enables this shift.

### “Girls Have More Responsibilities than in the Past”

With very few exceptions, respondents felt that the responsibilities of girls and young women have increased compared to the past. Those that did not think girls' responsibilities have increased said they thought the amount has stayed the same. No one we spoke to felt girls' responsibilities had decreased. These sentiments played out when women discussed their future expectations for their sons and daughters and when they discussed their preference for male or female children.

Directly attacking the idea of son preference, Shoomi told us that daughters are now preferable to sons because they are taking on more responsibilities than in the past. She attributes this to changes in education, as well as an increase in marriage age.

**Shoomi:** Nowadays, girls have more responsibilities than in the past. Girls worry about their parents, they study, they try to earn. They feel more for their parents. In the past, girls were married at a young age. But, now they're going to school and studying. Girls don't marry so early now. These days they work in the household, simultaneously maintaining their studies. Girls are definitely studying more now than in the past.

**Interviewer:** I see. Has it been more common for girls to work at a job?

**Shoomi:** Yes. Now they are entering the job sectors in greater numbers. The number of girls who work has definitely increased. And daughters who work are still compassionate and help their parents while earning an income.

Parveen and her sister-in-law tell us that daughters have increased expectations in terms of education and earning.

**Interviewer:** Do you think girls have the same responsibilities towards their families as in the past?

**Parveen:** No, it has changed...They are doing many things for their family. It has increased.

**Interviewer:** Can you give me an example of how their responsibility has increased?

**Parveen:** They are doing all kinds of work. What DON'T they do!

**Parveen's sister-in-law:** Girls are doing so many things. In the past, they didn't study, now they are. Isn't it a new responsibility! They are doing work, earning money. And hasn't it helped a family to be developed! Some girls earn money even working at home.

Sabrina, a young woman who has one son and is a primary school teacher, also feels that the respon-

sibilities of girls have increased. Using herself as an example, she explains how this is the case even for daughters who marry and follow the normative patrilocal residence pattern.

**Sabrina:** In the past, girls just performed their duties as a bride or a girl of the house. But, now, if a girl thinks that she needs to do anything for her family, she will do that. For example, if I think that my parents require anything, I can do that for them. I will work hard and try for my family. Even for my in-law's house. I always feel the responsibility of doing things for both of my families. I am giving my personal example here.

**Interviewer:** Sure.

**Sabrina:** I always try to know what my family members need. I try to fill up their needs. During the Eid festival, I try to buy gifts for my father-in-law, mother-in-law, and brothers-in-law. I also try to arrange food and other things...I think these are my responsibilities.

**Interviewer:** Yes. So you are contributing during the festivals.

**Sabrina:** Of course.

**Interviewer:** Couldn't girls in the past do the same things as you are doing now?

**Sabrina:** I don't think so. I think in the past girls could not do as much as we can do now. As far as I know, girls couldn't work like today. I think, as I am doing a job, I can try to meet all these needs and do other responsibilities for everybody, for all of my relatives. As I have my own money now.

**Interviewer:** With your own money, you can do that.

**Sabrina:** Yes, because I have my own money. So I try to fill up their needs and make them happy.

Sabrina's case demonstrates a twofold increase in young women's responsibilities: First, she contributes financially to the household of her in-laws, which was not an expectation families held for their daughters-in-law in the past. Second, is also compelled to provide for her parents when they need it. Sabrina's husband is a paid member of the military, but her personal money, the money she refers to above, comes from her teaching job. She cites her parents' investment in her education as the reason for her ability to have a job.

### **Distance between Households: Keeping Married Daughters Close**

Three to four generations ago, women in rural Bangladesh did not often leave their in-laws' *bari* except to visit their father's household on special occasions. Higher status families married their daughters to grooms who lived farther away and visiting the natal *bari* was accomplished more easily by women from wealthy families who could afford a *palki*.<sup>3</sup> On the other hand, travelling was not an issue for brides in poor families because marriages among these families occurred within closer-knit kinship networks, making the distance between households quite short. Although women's mobility in public space is accomplished more easily now than in the past, the distance between natal and marital *baris* remains a concern when parents arrange their children's marriages. The difference is that today, access

<sup>3</sup> A *palki*, also called a sedan chair or palanquin, consists of a seat or box wrapped in cloth that is connected to two or four long beams. Anywhere from four to eight men, or bearers, hold the beams and carry the *palki* from one place to the next. Wealthier families could afford these means of conveyance, as well as the human labor necessary to carry the *palki* and escort women on their journey.



to daughters' care is an important factor when considering *bari* distance.

**Interviewer:** Do you think it is better if your father's house is near to your husband's house or is it better to be far away?

**Afia:** To be near is better.

**Interviewer:** Why?

**Afia:** Because if it's near, then if my father or anyone else falls ill, or if anyone has a problem, then it's easy to go to my father's house quickly. If not, then if they fall ill, I will not catch them in enough time.

**Interviewer:** Are your father and mother alive?

**Afia:** Yes.

**Interviewer:** Ok, so what would your parents prefer: Do they prefer it if your house is close to their house or far?

**Afia:** They [also] think it is better if their children's father-in-law's house is near to their house.

Nazia's marital *bari* is a twenty-minute walk from her natal *bari*. She and her parents believe it is better to stay close by because it minimizes travel costs in case they become ill.

**Nazia:** If my parents are sick, I can visit them whenever I want. I can visit even two or three times. If their home was far away, could I visit like this?! It's better to be near. My husband is a daily-wager farmer. He earns 150 taka per day. It's difficult to maintain a family with this amount of money. Isn't it difficult for me to manage extra money for travel costs?! If you consider this, it's better for me to have my father's house near to my husband's house.

**Interviewer:** Ok. What do your parents think about it?

**Nazia:** They also feel good about it. Will they feel badly about it!

**Interviewer:** I see.

**Nazia:** My other sister cannot visit my parents as easily as I can. She lives far away from my father's house.

When a parent dies, it is sons who typically act as heads of household and, together with their wives, care for the surviving widowed parent. However, respondents reveal through their living arrangements and their comments about *bari* distance that daughters can now expect to be the ones who will care for widowed parents.

Women's care work in the *bari* occurs in a rural context where there are no social services or means of elder care beyond that of the family. When a parent becomes ill, the amount of emotional and physical care work can be quite intense, as we see from Ishrat's comment below.

What can parents want from girls! You see, in that house a bed-ridden old man has been there for one and a half months. He leaves his body to waste in the bed. He has a daughter who cleans all this and has taken care of him from the beginning of his sickness. Parents expect this kind of care from girls. Daughters also wail more than daughters-in-law in parent's death. They also care more. That is the thing parents expect from their daughters nowadays.

Roopa's family is an example of two generations of women being pulled towards their natal family for the sake of care work. Roopa explains that, as the only daughter among her siblings, she and her parents maintained a close relationship after her marriage:

**Interviewer:** So, do you think it's better to have your father's house near or far from your husband's house?

**Roopa:** Yes, it's better to be near. I can visit them easily.

**Interviewer:** Are your parents alive?

**Roopa:** My father is no more; I only have my mother.

**Interviewer:** What does your mother think about the distance? Does she feel good about having her daughter at a near distance?

**Roopa:** As I am the only daughter, they married me at a near distance. If they don't see me for a couple of days, they ask me to visit. They don't feel happy if they don't see me often.

### ***Ghor Jamai: Reliance in the Sons-in-Law***

Daughters-in-law, who were traditionally the solution to the care equation, are no longer viewed as a reliable source of future care in households with sons who are working abroad or in households with only daughters. The patrilocal residence pattern is being challenged as parents view biological daughters as their future source of care-giving and social support. In cases where parents want their daughters to remain with them, but also do not want their daughters to work outside the *bari*, the question arises of who will provide economic support in the future. Parents with only daughters may come to see marriage as an opportunity not only to negotiate the future care work that can be provided by a daughter but to gain economic security by adopting a son. Below, Mala tells us that she quells her sister-in-law's concerns over having no son by reminding her that she can "get a son" through her daughter's marriage.

My husband's younger sister has four daughters. She doesn't have any sons. She always worries about her future. She says she wants to adopt a son from anyone to take care of her when she grows old. I try to make her realize though. I tell her, "You will get a son when your daughter gets married. You need not to worry at all. He will take care of you like a mother, you will take care of him like a son."

Nazia, a young married woman with two daughters and no sons, says the decision to have another child and try for a boy is up to her husband. Although she currently has no sons, Nazia believes that it is more necessary for boys to get an education than girls. Nazia sees educating boys as good for their parents, as well as their future in-laws. She tells us that her lack of a son poses little problem so long as her daughters marry a good groom.

**Interviewer:** As you have only two daughters, have you ever thought about or worried about who would take care of you in the future or when you are old?

**Nazia:** What else! My daughters will look after me. Will they leave me! They and their husbands will look after me then.

Nazia's neighbor chimes in with a clarification: "You see, if the son-in-law is good, then daughters can do many things for their parents. If they are not good, daughters cannot do anything. That's why people usually need a son."

The practice of *ghor jamai* marriage maintains the alignment of economic value with boys and men. In small families, and particularly in families with only daughters, parents are reluctant to marry their

daughters out and allow them to move to an in-laws' house that is far away.

**Interviewer:** You said that parents expect their sons to look after them in their old age. They don't expect such things from their daughters. Now what will happen if parents have only daughters? Who will take care of them in their old age?

**Atfa:** Then, parents will want their younger daughter to be married at a nearby area or want their son-in-law to stay with them and look after them.

**Interviewer:** So, they want *ghor jamai*?

**Atfa:** *Ghor jamai*.

**Atfa's neighbor:** And with this, parents will prefer to marry their daughter within their relatives, so that they can get a son-in-law from a closer relation.

The *ghor jamai*, which translates to English as "inside/household groom," is viewed as a positive strategy among rural and working class families who use it to circumvent, rather than completely eschew, normative labor and residence patterns. By adopting a son through the marriage of their daughter to a groom from their kinship group, families recreate patrilineal descent patterns. Even family businesses and property can be kept within a family line because it can be passed from fathers to grandsons through the daughter/son-in-law dyad, without handing lands and households to daughters and their in-laws. It can also prevent surrendering property to siblings, which allows assets to be preserved for a widow or be passed on to children and grandchildren.

Among financially solvent families, the phrase *ghor jamai* has a negative, emasculating connotation.

When upper-class families are without sons, the father or patriarch of the family will manage his savings and assets in such a way that he can provide for himself well into old age. Family wealth means his daughters and their husbands never have to take responsibility for the bride's parents. In such families, a groom who comes to live with his wife's parents is viewed as a dependent and, therefore, less masculine. Class and status boundaries are made visible when a groom fails to earn enough to maintain the standard of living that his bride's father had achieved. In these situations, the groom may be denigrated with the term *ghor jamai*.

### Beyond Sons-in-Law and Daughters-in-Law

As an older woman with three sons and three daughters who grew up in a household with four brothers and four sisters, Shoomi has thought a lot about the various things sons and daughters do for their families. She believes things have completely changed with regard to sons and daughters. Without reference to any reliance on sons-in-law, Shoomi makes the case that son preference is declining and says parents today can rely on their biological daughters more than their sons. Her sentiment is shared by other women who continue to view sons as sources of financial stability, but not reliable sources of care work or emotional connection.

**Shoomi:** Parents adore their daughters more than their sons. Nowadays, daughters remain closer to their parents all the time, even after marriage. A daughter may bring you a glass of water, which is a symbol of caring towards her parents. She does other household work, too. Daughters take care of their parents when

they are sick. They help with cooking. Do sons do the same thing? They don't!

Parents with only daughters are renegotiating gender norms in order to secure their future financial well-being. They are becoming more open to new family and economic arrangements like allowing their daughters to work outside the home and *ghor ja-mai* marriage. As Lutfa explains: "If my daughter can earn for me, I don't need any sons." This is echoed by Sabrina, who is one of four daughters in a family with no sons:

Generally, in our society, parents' responsibility is all about getting their daughter married. But, there are some exceptions now. My parents are very happy that we, sisters, are working at jobs.

There are others, like Tahmina, who believe parents who make their daughters look after them are selfish.

**Interviewer:** What do the parents who only have daughters think about their future?

**Tahmina:** What else would they think! Maybe some will want their daughter to continue her education. Some will engage their daughter in any kind of business. They will do this for their own future. But, maybe one day their daughter will get married. I ask them, doesn't she have her own future!

Tahmina is one of two respondents who live in their natal *bari*, but felt that life would be better if they were living far away in a marital *bari*. Her critique reflects an important question that different families are answering in different ways: What will the future hold for these daughters?

## Discussion

Relieving poverty and promoting smaller families may have many positive effects for women and girls in Matlab, but it should not be taken as fact that women's lives automatically improve under existing economic development efforts. The contemporary focus on women's health and empowerment as integral to population control uses language that takes for granted a positive relationship between women's experiences and declining family size. The assumption that women benefit from smaller families and sending men abroad for work may be rendering invisible many of the unintended consequences of decreasing family size for rural women and girls.

In rural Bangladesh, the expansion of women's responsibilities to include caring for and even providing financially for their natal families represents a shift in the gendered division of labor. Under new arrangements, men's roles are narrowing to include financial support, burial arrangements, and a general responsibility for siblings. Men's responsibility towards siblings tends to also take the form of financial support, but this brotherly responsibility is also declining as people have fewer siblings than in the past. A double burden for women emerges in the context where care work is culturally defined as the purview of women at the same time that women's economic contribution to household finances is growing in acceptance.

The care work findings presented here share some similarities with Lee's (2010) research on care work in Japan, which found that gendered divisions of care work remain intact even when the normal hierarchy of who should care is disrupted by demo-

graphic shifts. As in Bangladesh, daughters in Japan would exit their natal family at marriage and norms of filial responsibility favored the role of the eldest son. Because women are seen as responsible for care work, the son's wife would care for her in-laws. However, changes in family structure and women's roles challenged this pattern (Lee 2010). In line with shifts in rural Bangladesh, Lee (2010) found that women in Japan are torn between caring for in-laws and caring for natal parents. However, families in Japan can increasingly turn to public or market resources to meet their parental care needs. No such option is available in rural Bangladesh where national policies emphasize urbanizing and exporting labor rather than developing local care resources.

Other research has linked state policies to globalization and the intimate world of care work (Misra, Woodring, and Merz 2006). By examining the various migration policies, welfare structures, and economic adjustments in France, Germany, Morocco, and Poland, Misra and colleagues (2006) show how states produce specific labor migration patterns and shape the gendered, international division of care. In Bangladesh, state policies have catalyzed widespread labor migration, but almost exclusively among men, creating a redistribution of women's care work at the local rather than international level.

On the surface, the shift towards educating girls, increasing women's mobility between families, and allowing women to earn wages may appear to improve women's lives. But, rather than producing an increase in financial stability and women's power within the family, this shift appears to be constraining women with a doubling or tripling of their re-

sponsibilities. These data do not suggest that women's decision-making or family power have significantly changed; instead, women experience increasing demand for their domestic labor coupled with growing expectations that they will work for wages now or in the future. This finding is consistent with research from other rural areas of Bangladesh, specifically that of Chowdhury (2010) who found that family decisions to place women in the paid labor force are not a matter of balancing labor and leisure time, but rather a decision about balancing unpaid household work and paid work outside the home.

The findings of this study can be contextualized through the contributions of Naila Kabeer (1994); specifically, her description of how women became a particular constituency in development efforts. Kabeer points out that, since the 1950s, economists have been concerned with "the population problem" as a barrier to achieving economic growth in the developing world. With limited knowledge about how people's lives are organized in terms of marriage, parent-child relationships, and kinship, economists set development agendas that include economic and fertility goals. Development models are based on the assumption that high rates of population growth inhibit national investment capacity because economic surpluses would have to be "used up in consumption and welfare expenditures instead of being invested in productive capital formation" (Kabeer 1994:3). Women, then, are central to development efforts as free care workers who serve in the home, and as liberal individuals who can choose to curb their own fertility. Through policy, social and economic changes are set in motion with little to no regard



for the consequences of development agendas for women and families.

Raewyn Connell (2014) goes further, pointing out that new economic development strategies are not just about relieving national debt burdens and creating surplus by shrinking social welfare, which hardly existed in the poorest countries to begin with. Dismantling and discouraging social welfare programs has been part of a larger development agenda that, Connell (2014) argues, is an extension of coloniality as global capital seeks comparative advantage in the Global South. Economists view women who provide unquantified reproductive labor in the home as an untapped resource that can be leveraged towards production as inexpensive sources of labor. From this, we can understand that the coupling of population control with economic development means that the family and, specifically, women's bodies become sites for a development agenda that is also the neoliberal agenda. Considering how rural women are less likely than men or their urban counterparts to reap the benefits of market-led economic growth, it can be said that rural women face increased burdens in service of economic shifts that benefit others, but rarely benefit them.

## Conclusion

In Matlab, demographic changes like increasing life expectancy and decreasing family size are concurrent with male labor migration and increasing access to education for girls. Daughter's responsibilities are expanding to meet new expectations about educational attainment for girls and the expectation that they will take on duties no longer fulfilled by

their male family members. Increasingly, husbands, brothers, and sons are absent because men are migrating in search of paid work; or these men did not come into the picture in the first place due to smaller family sizes overall. The increase in women's filial responsibilities is evidenced by parents' discussions of their future expectations for their sons and daughters and through women's descriptions of their own life circumstances today. With few exceptions, respondents felt that families have come to expect more from their daughters while expectations for sons are either staying the same or decreasing. The changes in residence, marital, and labor patterns described here represent, as Connell (2014) describes it, a dis-ordering and re-structuring of gender relations. Emerging family structures appear to shift a tremendous burden onto women and girls within the family.

Policies and political language that emerged after the 1994 conference in Cairo often conflate fertility reduction with women's empowerment and poverty reduction. The unquestioned assumptions that link low fertility with women's empowerment ignore the entanglements of gender and kin relations, including the complex effects of family size on women's labor and care work. In rural Bangladesh, population policies combine with state policies aimed at opening the economy and promoting the out-migration of men in the villages. As these data demonstrate, adjustments in family arrangements that become necessary for smaller rural families, and for labor migrant families, may indicate an increase in the value of daughters, but this increase in value is predicated upon growing filial demands on women's capacities to learn, earn, and perform family care.

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### **Book Review**

**Leavy, Patricia. 2017. *Privilege through the Looking-Glass*. Rotterdam, Boston, Taipei: Sense Publishers**

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The book *Privilege through the Looking-Glass* provides a collection of essays that delves into the humanity behind the vast number of demographic groups hindered by privilege. Privilege is an unearned advantage that in the provided essays exists due to the historical establishment of a norm and the undeterred exposure of communities to that norm.

Frequently, privilege's very nature causes its perception to be based on its quantifiable effects. Patricia Leavy collects essays that redefine how privilege is viewed in a manner devoid of numbers and generalizations. She allows the contributors to provide first-hand personal accounts of experiencing privilege's effects, challenge the reader's idea of how to inclusively approach people outside his or her community's idea of normal, and invite readers to accept personal traits as non-definitive attributes that can diversify worldly experiences.

The essays' personal views on privilege's consequences lend the book its title, since the personal stories function as a looking-glass, distorting superficial views of privilege. The essays very effectively showcase common ideas of how gender, race, sexual

orientation, religion, disability, and an array of other traits are used to define individuals from a case-by-case basis. The book ties the analysis of these instances together through an easy to follow structure and format.

First, language is analyzed because of privilege. Privilege leads to the development of terms over time that seek to encompass the entirety of the person. For example, in the essay "Titanium Tits," a woman who grows up with the titular nickname being used only seldom by a friend is led into a phase of deep anguish through the classification. Later in life, the same woman comes out as lesbian and is impacted profoundly by the word dyke. These words stay with the woman for years and encompass a large portion of her existence despite a life filled with events seemingly more worth reminiscence. These derogatory words encompass a reductivist thinking that men can acquire due to privilege eliminating repercussions for unwanted remarks towards women. This essay among others within the book excels at making the reader wonder at the author's anguish, but simultaneously understanding the harmful impact such briefly intended words and actions can have.



Next, the book presents essays that challenge the reader to accept that power dynamics within these personal essays result in the party with lesser privilege to sometimes be reduced to an object-like status or a word that only focuses on a single aspect of character. As mentioned, privilege is often quantified to demonstrate its destructive effects, but Leavy selects essays that involve power dynamics creating a grotesque image of inequality within important and interdependent relationships. We appreciated this approach to presenting privilege anecdotes; advances to use sensitive language and inclusive actions are often tailored to individuals who feel distant from their privilege due to general statements rather than personal stories being presented. Again, the reader is exposed to these essays that demonstrate the destructive effects of privilege abuse on an individual level, and the reader is challenged to evaluate his or her own privilege and potential abuses of that privilege.

Finally, *Privilege through the Looking-Glass* contains an imperative thematic purpose, to transition the reader's usage of character attributes from definitive to non-definitive. This means a trait such as skin color or gender is welcome as creating diversity in society, but will never be used as a factor in defining a person. One of the most powerful displays

of this thematic intent is in the second essay of the book, an essay by Robin Boylorn. Boylorn warns of the danger of attempting to ignore visual identifiers, informing that identifiers such as skin color exist and are a character attribute. Boylorn admonishes a classroom that "To not see my color diminishes me, disappears me." The essay seeks to describe the importance of seeing character traits as diversifying the world without dividing it. Boylorn's call to action invites the reader further into understanding privilege. She prepares the reader to acknowledge the shortcomings of people addressing character traits and deviations from societal norms in the book's following stories.

*Privilege through the Looking-Glass* achieves its purpose of redefining an examination of privilege. The book presents stories that affect the reader's approach to privilege through their presentation of relationships with unearned power dynamics. When the diction of the stories presents objectifying language set to reduce the experiences of less privileged individuals, the effect of privilege is apparent without the use of any numbers or general statements. *Privilege through the Looking-Glass* is an effective book for properly understanding privilege, a concept best understood through the people it affects directly.

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