A FIELD GUIDE TO CROSS-CULTURAL RESEARCH ON CHILDHOOD LEARNING

Theoretical, Methodological, Practical, and Ethical Considerations for an Interdisciplinary Field

EDITED BY SHEINA LEW-LEVY
AND STEPHEN ASATSA

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5. Preparing for the field

Coordinated by Adam Boyette

Contributors: Dorsa Amir, Adam Boyette, Alejandrina Cristia, Alyssa Crittenden, Ardain Dzabatou, Michael Gurven, Vidrige Kandza, Patricia Kanngiesser, Nokwanda Ndlovu, Sarah Pope-Caldwell, Marie Schäfer, and Andrea Taverna

This chapter aims to help readers prepare for going to 'the field'—the location(s) where data will be collected. We discuss starting a new field site, collaborating at established sites, and practical strategies for building and maintaining ties to the field site longitudinally. Throughout, we emphasize that developing trusting relationships with the community is critical to ethical research practice and essential for good science. Starting from this principle, we review the practical strategies for relationship-building and establishing ethical research practices, especially in regard to work with children and in settings with little to no infrastructure for research oversight. Also, personal experiences and practical aspects of conducting research are presented, including: obtaining permissions to conduct research with 'human subjects', developing rigorous consent procedures, writing codes of conduct for research staff, data storage and access concerns, staying safe and healthy in the field, and designing comprehensive and ethical budgets.

5.1. Introduction

Researchers who study children's learning across cultures come from a diversity of disciplinary and theoretical approaches. The idea of 'the field'—the location(s) where we collect our data—is

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central to each of these approaches. We also believe it is useful—if not critical—for researchers from disciplines like experimental psychology to think of the university laboratory as a 'field site'. This is because many of the steps that lead to the encounter between the researcher and study participants are the same no matter where this encounter happens. Moreover, these encounters always involve social dynamics resulting from individual differences among the researcher(s) and participant(s)—in terms of gender, race, class, ethnicity, age, relative power in the situation, and so on. If we are unconscious of these dynamics, they can influence data collection in unexpected ways, especially when doing cross-cultural research. Guided by both senior and more junior researchers and those who have worked both within and far from their home communities, this chapter aims to help prepare the researcher for these encounters 'in the field'.

First, we discuss different field situations that a researcher might encounter, as well as the logistical and relational affordances and challenges each presents. Whether the researcher wishes to develop a new field site or work at an established site, work far from home or in their local community, the choice of where to study children's learning involves balancing convenience, cost, chance, and curiosity. We aim to leverage our varied experiences and those of the broader fields of anthropology and cross-cultural psychology to guide researchers through some of the complexities of these choices.

Then, we discuss the value of the researcher working with as well as in a community. Developing trusting relationships with the community is critical to ethical research practice and essential for good science, even when a researcher may have a single or only a few encounters during their work (e.g., visiting a collaborator's site to run a single study). We will discuss the role of the researcher as part of the community, building local collaborations, working with international and multicultural teams, and planning with the community. Additionally, recruitment of research participants and local assistants will be considered, with an emphasis on the embeddedness of such simple processes within complex community norms and social networks.

Finally, in conducting their work, the researcher is typically representing one or more institutions or organizations that pay their salary and fund their research, and they are therefore accountable to them. As an interface between the community at the field site and these other bodies, the researcher must navigate a range of ethical obligations to all of the parties involved. We will walk through our experiences with such practical aspects of conducting research, including obtaining permissions to conduct research with 'human subjects', developing rigorous consent procedures, writing codes of conduct for research staff, data storage and access concerns, staying safe and healthy in the field, and designing comprehensive and ethical budgets.

We wish to acknowledge that, while efforts are ongoing to diversify academic fields conducting cross-cultural research, including from a geographic perspective (Apicella et al., 2020; Krys et al., 2024), the overwhelming majority of researchers doing fieldwork are foreigners, who do not come from the community of study, nor necessarily from the same country. This is also the case among the contributors, with important exceptions (see especially Boxes 5.1 and 5.2). Given this situation, we hope that the experiences and guidance we share in this chapter will inform the reader of some best practices regardless of their situation vis-à-vis their field site, but also that we can motivate contributions from and collaborations with local researchers to the field of cross-cultural research on children's learning.

5.2. Finding and maintaining a 'field site'

Deciding where to work

Where should you conduct fieldwork? A number of factors should be carefully considered. The first set of factors relate to the scientific fit between the research question and the field site. What is the central question of the research, and how well can that question be answered through fieldwork with the community in question? In other words, what is the relevance of the field site to the question at hand? For example, the motivation to conduct

cross-cultural fieldwork is often to test the generalizability of a certain phenomenon outside of the original testing site. While this can be a useful endeavor in its own right (Barrett, 2020), we can increase the depth of our explanatory power by being more thoughtful in our approach. First, we should clearly identify the appropriate cultural community that best fits our research question—be it a nation, a village, a family, or some other unit (Amir & McAuliffe, 2020). Second, we should clearly identify the specific cultural or environmental features of interest and, ideally, pre-register how we expect those features to co-vary with outcome variables (see Nosek et al., 2018 for further detail; though we understand that pre-registration is not always feasible or appropriate). For instance, if our hypothesis concerns the role that subsistence strategy may play in shaping children's sharing behavior (e.g., Rochat et al., 2009), the appropriate cross-cultural sample should tap into a diversity of subsistence strategies.

Of course, not all researchers have equal ability to travel to or access communities of interest. Nor do all communities want to engage in research collaborations. As such, a second set of factors relating to field site choice concern the practical and logistical challenges a certain site may pose. Accessibility, safety, and permission to conduct research are often determinative factors. When possible, however, researchers should seek to strike a balance between feasibility and scientific fit. In some cases, where access plays a greater role in site selection, researchers should consider tailoring and adjusting their research approach to better match the unique features of the site. We also encourage researchers to clearly state the factors that influenced site selection in academic manuscripts, even if it is simply stating that the field site choice was opportunistic. This follows a longstanding tradition in anthropology, where dialogue between place and research questions has been a core, if sometimes conflicted, part of the scientific process (Johnson, 1991; Weisman & Luhrmann, 2020).

Once the researcher finds a field site that fits their scientific objectives, what about personal fit? Ideally, researchers should demonstrate cultural competence, remaining highly aware of the variety of cultural values, norms, and customs inherent to a given

site. The ability to communicate in a common language using shared vocabulary is hugely important for success in the field, as is the ability to contextualize the research question within the community's cultural framework. In many cases, the best way to achieve cultural competence is to collaborate with communities that the researcher is a part of, collaborate with local researchers in their communities, and/or spend a significant amount of time learning about and participating in the community's culture prior to conducting any research (Agar, 2008; Broesch et al., 2020). Below, we lay out strategies for working in and with communities to achieve successful and equitable research partnerships.

Setting up a field site

It is daunting to set up a project at a 'new' field site. By new, we mean one unfamiliar at least to the social and life sciences, or that may no longer have active researchers working there. Doing so, however, can be immensely rewarding when other field sites are either crowded or over-studied, or when other sites may be ill-suited for pursuing particular questions or a poor fit to the individual researcher. Given the role of culture and the physical and social environment in shaping many aspects of development, progress in both theory and empiricism will require broadening the range of studied populations (Amir & McAuliffe, 2020; Greenfield et al., 2003; Gurven, 2018).

Where to start in setting up a field site? First, scour prior studies, government and non-governmental reports, news articles, and any other relevant information about the region and local culture (Karasik et al., 2018). This is crucial for providing background information and potential contacts to make direct inquiries. Together, these and contacted sources can provide insights into the history, politics, and ecology of a region, and practical logistical information before your first visit.

A first visit should not be rushed. Give yourself enough time to seek permits (see Section 5.3), make broad contacts and organize meetings with community leaders and other relevant entities. Devote time to meet community members, and to gain their trust.

This could take months, not days, or even weeks, depending on the size of the community(ies). Trust often comes from participating in activities of daily life, eating local foods, trying to learn the local language (even when translators are available), and sharing experiences in ways that are distinct from data collection. Having key informants, reputable go-betweens who function as both translators (if needed) and cultural facilitators, can help accelerate how quickly you are received and welcomed. The difference from doing the same in an established site is that here you can't piggy-back on the established trust of other reputable workers.

Cognitive and emotional development, learning, social networks, and other topics involving children can be delicate to study in some communities unless trust is well established. To work with children, trust relationships must be established with parents and teachers. Ongoing commitments to help support schools, with supplies and other materials, and from volunteering your time to help serve educational needs, are two ways both to contribute locally and to establish a public commitment to working with children and adolescents (e.g., Morelli, 2012).

Ensuring you are welcomed back to the same field site, whether for longitudinal study or to conduct additional studies, requires mutual respect and mutual gain (see Box 5.1). Explicit conversations about community needs and interests are vital to see how fulfilling your own project goals can at the same time be a source of pride and commitment for community members. When one of us (MG) was building infrastructure for the Tsimane Health and Life History Project (THLHP) over multiple visits between 1999–2001, community members in multiple villages often complained that rampant sickness and limited healthcare were major obstacles. There were certainly other problems, but addressing health concerns tied directly to the major themes of the THLHP. When the THLHP officially launched in 2002, three Bolivian physicians were hired to serve community primary health care needs, while simultaneously collecting epidemiological information, in sync with anthropological studies. Later initiatives included public health outreach and health promoter training. The desire for health care contributions in a remote region with

very limited biomedical surveillance or outreach quickly became a strong motivation for villages to invite the THLHP to work there, and to return year after year.

There is no doubt that setting up a new field site involves major time and financial costs, and can slow one's professional trajectory. A few conditions can help make the burden more bearable. First, going it alone is not just old-fashioned; it is limiting, and not as much fun. So much more can be accomplished with multiple, mixed-gender, ideally international (see Box 5.2) collaborators from the outset. Multiple Principal Investigators (PIs) or co-Directors not only ease the joint burden of organizing and maintaining a field site, but also help increase total productivity. Working together can increase your chances of finding grants to support the management of ongoing projects. In all cases, you can bring in students, postdocs and other collaborators.

Second, even if your designs are for a longitudinal study, few can afford to wait years before publishing. It is therefore helpful to organize a few initial short-term studies. For example, initial self-contained studies employing experimental methods to study effects of market integration on economic cooperation (e.g., Gurven, 2004a, 2004b) helped ensure no major gaps in productivity during the early years of investment in the THLHP. Indeed, every long-term project starts out as a limited, cross-sectional foray. Full disclosure: the THLHP was originally designed as a one-year study. The generous buy-in from local communities, the web of new questions that spun from initial findings, a team of committed researchers, and a reliable, sufficient funding source all helped to slowly extend a one-year study to a three-year study, then five years, and now 22 years and still going (see also Leonard et al., 2015).

Collaborations with established field sites

Often, field researchers work in places where others have worked before them. Even if you intend to branch off to establish a new site, it is typical to follow a path already laid as an entrance to 'the field.' For instance, many of us followed a mentor or other colleague to their site—or at least their first site. There are many

advantages to this approach, including the benefits of teamwork mentioned above. Working at an established field site means you can be introduced to the community by someone people know and trust, and your colleague(s) will be able to give you important local information and facilitate access to the interlocutors and research participants your work requires. As noted in the previous section, however, it is essential to fieldwork that researchers have the trust of the local community, and this is especially the case for working with children. Thus, sharing a site—even if for a short stay for a single study—means sharing the burden of making and maintaining positive relations. As part of the same outsider researcher community, the local reputations of you and your collaborators will be entangled.

Even if you will stay at the site for a short while, it will be advantageous to relationship building in the community—and therefore to data collection—that you come to understand local norms and what your role is as a researcher in the community. People are more or less familiar with what researchers do, and this will influence what cultural categories people will ascribe to you, and therefore which norms apply. Some things a new researcher at a field site should ask their more experienced collaborator(s) are:

- What is your role in the community?
- What assumptions do people have about you? (e.g., is there a historical context, such as colonization, that affects how outside people with different identities are perceived?)
- What can I do to build good rapport?
- What is the role of children in the community (e.g., more or less autonomy)? How does this affect consent/assent procedures?
- Who should be approached regarding consent for a particular child participant (both parents, primarily the mother/father, any supervising adult)? How should they be approached?
- What is the appropriate physical, psychological, and emotional distance to keep from people in this community?

Very often cross-cultural researchers work with research assistants who are more familiar with the community and cultural context, perhaps because they are from the community. These people are critical cultural liaisons and can also be important intellectual partners in projects. In the context of field research in small, rural communities, sometimes research assistants are recruited from cities where there might be more people with research-relevant skills and experience. If you bring an assistant from outside the community, you will also need to think through how this person will be viewed by the community. What is the relationship between the urban and rural communities? Are there relevant ethnic, class, or other differences that may impact how your assistant will be perceived? Of course, following the guidance of experienced collaborators at the site will be critical here as well.

We will discuss the ethics from the position of institutions in Section 5.3, but the reality of how you ethically recruit participants in your cross-cultural research project at a field site is often not as simple as asking someone to participate and having them sign a consent form. This is again an area that benefits greatly from the help of experienced collaborators. Anthropologists recognize consent as an ongoing process, where the researcher must be attentive to when those with whom they work feel coerced or do not fully understand what is being asked of them (LeCompte & Schensul, 2015; Spradley, 1979). This is especially the case with children. For instance, some of us have had experiences where parents consented to their children's participation and pushed their children to comply when they did not want to. At other times, both parents gave consent for their child, and their child assented to participate, but eventually expressed discomfort or fear during data collection. In such situations, we ceased working with the child, despite their parents' disappointment. Everyone is different, and there are often differences at the group level as well. The researcher must be sensitive to this. For instance, during a focal-follow observational study (where data is collected with one child at a time, see also Section 4.2), a child who had assented but showed fear later continued their activities alongside the other children and the researcher (AB) and data collection went ahead as

planned—the child simply did not like being the focus of attention. As much knowledge as you can gain from collaborators about their process of consent, and experiences they have had with refusals as well as consent or assent, the better prepared you will be to respectfully recruit participants.

Box 5.1 Indigenous perspectives on field research

As researchers, we need to continually reflect on whose perspective and knowledge system is prioritized in a given research project, from how the topic is framed to the choice of methods used. Entering the child development research space as a Zulu scholar who is also from the communities that I (NN) tend to study has often left me feeling a different sense of responsibility than an outsider might feel. Specifically, my approach reflects my role as a community member, and that has meant different things depending on the study but always shapes my research questions. For instance, I am interested in moving away from 'damage-centered' questions that focus on what is wrong from an outsider perspective (Tuck, 2009) and instead towards those that highlight aspects of our cultural values and beliefs, particularly around why these beliefs exist and the purpose that they serve within the culture from an Indigenous perspective.

The end goals of research projects might look different for Indigenous scholars that conduct research in their own communities, where there is an orientation towards rectifying past ills from research (and larger societal misgivings) and, often, an aim to empower and heal the community. My research process is informed by my Zulu cultural values that underscore the relationships and interactions in my home communities in South Africa.

There are a few ways I have worked to attend to the Indigenous worldview and center the community's voices in different projects. For example, several cultural values

become salient throughout my research: *ukuhlonipha* (respect), reciprocity, *ubuntu* (humanness), and equality. Like many Indigenous languages, the subtleties that are lost in translation probably matter more to people in the culture, and this issue of when and how to translate is an ongoing topic of discussion among Indigenous scholars where there is currently no solution, outside of publishing in our own languages in the few journals that allow that. For my purposes here, I relate these Zulu words to their closest English equivalents (in parentheses), but since something is lost in the process, I will be more deliberate when I describe more abstractly the Zulu idea versus its English parallel concept.

Ukuhlonipha (respect) refers to a hierarchy-based respect, where one's societal responsibilities and social cues come from one's status relative to those with whom one is interacting. To a Zulu person, respect is mutual and must be reciprocated. The most salient regular demonstration of respect in the culture is greeting participants with their proper title, which attends to the hierarchical nature of Zulu culture by honoring one's age-set and status within the community. This example demonstrates a centering of Zulu cultural values in the research process and how a knowledge system is integrated as part of the process. By drawing from and through the use of local knowledge, this places emphasis on the idea of viewing the community as experts in knowledge construction. Important Zulu expressions that are meaningful to the community have also played a role in my interactions, including *kulahlwa kabili*, which roughly means 'kindness is reciprocated' (Nyembezi, 1954). This proverb was embodied in one study when I gave a child a lollipop and she ran off only to return with a piece of chocolate for me. Kindness must be reciprocated. As researchers we should always consider how our research benefits the communities being studied, and we should be conscientious about how

participants are compensated. *Ubuntu* (humanness) refers to the connection all of humankind has to one another, and has been popularized as 'I am because we are,' denoting the African sense of self that is derived from community. Many of the communities I work with live in poverty, and by honoring important cultural values such as *ubuntu* I am able to rely on the community's understanding of fairness and equality.

As researchers, we should be mindful of not unintentionally creating more instability in a community. These are some of the few examples of how I have worked to center the community's values in my research, which leads to building trust and meaningful interactions. As an Indigenous scholar whose studies are often conducted in my own community, it becomes even more crucial to pay attention to these interactions because my relationships with these communities transcends the research process as a member of the community.

Longitudinal field research

If you conduct your research in a field site long-term, or when establishing a new research collaboration, you may visit a place or community several times, or even on a regular basis. But even when planning a short-term project in an established site, it can still be beneficial or necessary to spread your research activities over more than one visit. Revisiting a community offers important advantages when preparing for the field, and in some cases these advantages can outweigh the extra costs and time involved in traveling to a place multiple times. Here, we help readers think through some of these advantages and how to navigate a sustained research presence at a site, even when you are physically absent.

First of all, you can plan and prepare your research project and your collaboration with the community more thoroughly when revisiting a place. For example, you will have a better idea of what you need to bring along and what you can acquire locally when

you return a second time. You also will have more time between visits to organize things you would like to contribute based on agreements with the community. Most importantly, conducting a research project through several visits gives you the possibility and time to rethink and adapt your research plan and design based on the things you learned during your past visit(s). This can be particularly useful and important if your research involves questions and methods that are new in the specific context and that you might want to discuss with local informants or try out in a pilot study first. For example, for most studies with children, it is advisable to conduct a small pilot study first in order to try out a procedure or to identify materials that are appropriate and intuitive for a particular age group or in a particular cultural setting. If your study involves a cross-cultural comparison, you may want to conduct a pilot in more than one site in order to find a method that is suitable and produces comparable results across sites and cultural contexts (e.g., Kanngiesser et al., 2022). In such cases, it can become necessary to plan for more than one visit to pilot and conduct a study in a particular site.

Second, not only can you as a researcher prepare better for the field, the community and people you work with have a better idea of what to expect from your presence, and can plan or (re) think how they would like to work with you the next time. Based on their experience during your past visit(s), they might be able to make concrete suggestions about when a good time would be for you to come back and how your research could be organized most efficiently, but also so that it fits in well with other community activities and their schedule. In the best case, you can plan consecutive visits together, either during your stay, or remotely by staying in touch while you are away.

Third, in some cases it can become important for your research to collect data at different points in time, especially if the availability of your participants or the phenomenon that you want to investigate could be influenced by seasonal activities and events or other changes in the community over time. For example, in some places your participant sample could be biased if recruitment takes place only during a particular time of year, e.g., if a certain age or

gender group (or other sub-group of possible study participants) is involved in seasonal activities that prevent them from participating in your research. In other cases, the phenomenon or behavior you want to investigate may be affected by the specific timing of data collection more directly. For example, if you study children's social interactions (e.g., with adults and peers), your findings may be quite different if you collect data during the school term or holidays in some places. Thus, sometimes, you may even consider collecting your data during more than one visit in order to obtain more representative results.

While preparing for the field becomes easier when revisiting a place, it remains important that you cultivate your relationships and collaborations during your absence, and that you renew your agreements and consent with the community over iterative visits. This is particularly critical if your visits are irregular and involve longer absences of variable time (which is typical given the complexities of research work). Ideally, you can maintain connections while being away by staying in touch remotely with local colleagues, research assistants, and other community stakeholders. If your field site is in a remote place where people have little access or private means to contact you via phone or internet, you could develop specific strategies together with your local collaborators for staying in touch. For example, you could plan for mobile phones or phone credit in your research budget that can be used to contact you while you are away (see Section 5.3), or you could make a plan about who people should contact in order to get in touch with you. Even in places where communication via phone and internet is not feasible at all, you can usually find ways to stay in touch, for example, by collaborating with local institutions, organizations or other researchers in the area who may be able to transmit messages (or even deliver letters or small packages) from and to you.

If your visits to a community are irregular and with longer absences in between (and if communication during your absence is difficult), it becomes essential to invest time to re-establish relationships and reintroduce yourself and your research when you return the next time. But even if you visit a site on a regular basis, it benefits your research collaboration if you plan in some time for reconnecting and getting up to date at the beginning of each stay.

Finally, there is always the possibility that conditions and circumstances you expected to remain stable when planning your trip have changed while you were away, and you therefore have to adjust your current plans based on the latest developments. For example, collaborators or research assistants you planned to work with may no longer be available, or new people may be interested in working with you. Informants or participants you assumed to be there may have left the community, or others you did not expect may have moved in. Authorities or important gatekeepers may have changed positions, or collaborating institutions (e.g., schools) may have altered their organization and schedule in ways affecting your research plans. Or the community or participant group you planned to work with may have changed their attitude or expectations regarding your research based on experiences they had during your absence. Second, you may want to inform the community or people you work with about the progress of your research project(s) and, at the same time, give them a chance to raise questions and concerns, make suggestions regarding your current plans, or discuss possible changes regarding your work agreements. Most importantly, even if you continue a long-term project from previous visits, you should make sure to renew or (re) obtain the community's and participants' consent before restarting your activities.

5.3. Forms and resources

Permits & regulations

Understanding required research regulations and permits can be challenging, and local collaborators are crucial in such an endeavor. In the absence of such collaborators, talking to colleagues who have worked in the same places may also provide some insight, as noted above. In both cases, however, people in the past may not have followed all extant regulations and/or new regulations may have been put in place. It is therefore worthwhile to attempt web searches with keywords such as 'research regulation [COUNTRY NAME]' (in the appropriate country-specific languages) to check

what may be present. It would be ideal to have a resource that links all the regulations relevant to research, research with children, or research with minorities, in the world, but to our knowledge, this does not yet exist.

The Language Acquisition Across Cultures team (LAAC), which includes one of us as a team leader (AC), recently reviewed regulation governing data protection specifically for several countries in Africa (Ghana, Malawi, Namibia, South Africa, Tanzania), Asia (China, India, Israel, South Korea, Vietnam), Europe (Denmark, Finland, France, Netherlands, Norway, Sweden, United Kingdom), Latin America (Argentina, Bolivia, Brazil, Costa Rica, Mexico, Uruguay), and Oceania (Australia, Papua New Guinea, Solomon Islands, Timor Leste, Vanuatu). Given that much research builds on the creation of datasets that contain potentially identifying data, and therefore personal data (according to most definitions), these reports may be useful to readers of this chapter. These reports were the fruit of internships or short contracts by non-specialists, so we recommend care when re-using them. On a more positive note, they are all publicly available (Léon & Cristia, 2024).

By and large, what the LAAC team found was that the extensiveness of data protection regulation varied across countries, with some having extremely detailed and extensive requirements (Uruguay) and others having nearly no requirements (Timor Leste), with the general trend being that regulation was most detailed in Europe and Latin America, less so in Asia and Africa, and least extensive in Oceania (with exceptions to these generalizations). Despite such variability, the LAAC team also found that, if one follows the most detailed regulation (e.g., Uruguay), one typically complies with all other regulations in broad terms. The most detailed regulation often has very simple and reasonable requirements (as summarized in Léon & Cristia, 2024), including ensuring and documenting informed consent, making data transfers secure, providing participants the right to withdraw their data, developing a data management plan which considers participant anonymity and privacy, and providing them with a way to contact researchers (which is a reason why ensuring multiple curators is essential when archiving—see Section 7.6).

Naturally, ensuring that participants can contact researchers may be difficult for remote populations, but this can be addressed by, for example, making sure that members of the community have the names, emails, and phone numbers of the principal investigators and those of trusted others, and asking them to pass on this information to anyone else who asks. This builds on best practices discussed above for building and maintaining good rapport with the community. For countries whose regulation does not require such specific actions, these can be viewed as best practices from an ethical standpoint. In addition, it is still worthwhile checking if a given country has a 'data protection agency' or something similar, which is typically a government agency that keeps track of all databases that include personal data from their citizens.

Note that the above-mentioned 'best individual data protection practices' are rights and not obligations, and also that they are not culturally neutral: participants who wish that their identifiable data be posted publicly can still ask for researchers to do so, and there are cases in which this appears like the best choice (e.g., to assure recognition of the holders of knowledge; see Box 5.1). One more issue that readers should bear in mind is potential commercial applications: some regulations rule out the use of research data for commercial applications (Namibia), because an entirely different procedure needs to be followed in the case of research with this potential. And yet, some communities may be interested in their data being licensed for commercial uses against the potential of economic gains (e.g., every time the dataset is downloaded, the community is paid; or if a product is developed based on it, then the community receives a portion of the profit). Therefore, rather than ruling out this possibility, we advise open conversations with the community as well as detailed perusal of extant regulation.

Local governments

Research involving Indigenous participants often requires authorization from local governments (e.g., city/village councils, public schools, educational districts). While we have emphasized

the importance of working with communities, this aspiration can be complicated by tensions between Indigenous interests and those of the different layers of government that intersect their spaces and livelihoods.

In recent decades, a series of international instruments have been formulated to protect the rights of Indigenous peoples (United Nations, 2009), but these measures are still not implemented in many communities around the world. The absence of such instruments can be problematic in two ways. First, it may be a potential condition for the proliferation of research practices that do not ensure what is known as the 'four R's' (Louis, 2007): Relational Accountability, Respectful Representation, Reciprocal Appropriation, and Rights and Regulations during the research process. Second, it can be useful for certain local governments whose language and education policies are often at odds with decolonial research practices (Castro-Gómez & Grosfoguel, 2007; De Sousa Santos, 2009). This is because these types of research practices, based on sound ethical principles, tend to strengthen Indigenous knowledge and vernacular languages in the face of homogenization, monoculturalism, and monolingualism, which can run counter to state-building activities.

Within the so-called 'Global South', Latin America is a case in point. Although this region is an intercultural, multiethnic, and multilingual continent, the education policies of Latin American countries often ignore the numerous vernacular languages that have always circulated within contemporary national boundaries. In many Spanish-speaking countries, including Argentina, this disregard has its roots in the particular postcolonial history of linguistic homogeneity around Spanish as a national language (Vidal & Kuchenbrandt, 2015). One of us (AT) has worked as a researcher on the acquisition of the Indigenous language of the Chaco—Wichi lhomtes—and drew on an example of these epistemological and political tensions during an experience doing fieldwork in Indigenous schools in the Chaco Region, in line with other similar educational efforts in the region (e.g., Nercesian, 2014; Zidarich & colaboradores, 2006). This work led to the creation

of mechanisms that allow Indigenous teachers to participate and drive an educational research agenda that meets the needs of their community (Taverna & Baiocchi, 2021). One example of this is the development of pedagogical and didactic resources (e.g., author-native children's books, literacy workshops in vernacular languages) that are culturally responsive to Wichi epistemologies and practices (Pérez et al., 2017a, 2017b, 2017c, 2017d, 2017e, 2021). The resources developed are based on two main premises, namely, that the understanding of the world is broader than the western understanding of the world and that diversity is infinite (De Sousa Santos, 2009). Thus, the content of these decolonial resources emphasizes alternative forms of thinking, representations of what we call 'nature' and the relationship between the human and non-human worlds.

The main obstacle is that a decolonial educational research agenda, such as the one in the above example, can come into conflict with the interests of local governments' educational policies, which may be in line with the hegemonic knowledge of western academia. This hegemony asserts, among other things, exchange value, individual ownership of land, and the primacy of the material over the spiritual, thereby blocking emancipatory knowledge and sacrificing alternatives from the perspective of Indigenous ways of knowing (De Sousa Santos, 2009).

Cross-fertilization between Indigenous community representatives, researchers, and local governments from the beginning of the research process is a *sine qua non* for the promotion of Indigenous initiatives in the mainstream, contributing to the emancipation of Indigenous knowledge and practices while creating opportunities for mutual openness between the academic field and the community (see also Box 5.1).

Institutional and Indigenous codes of ethics

It is common in many research settings that researchers working directly with people (i.e., human subjects) demonstrate that their intended research project has been reviewed by an outside—ideally

impartial—body of experts to assure it is ethical in its design, methodologies, and aims. Here, we discuss common issues in proposing cross-cultural research with children to one type of ethical review body, often called an institutional review board. While the ethical review of research projects is certainly desirable, in practice new ethical dilemmas arise from attempting to navigate the realities of cross-cultural research with the requirements of top-down, institutionally mandated regulatory bureaucracy (Schrag, 2010), especially in light of some of the conflicts between Indigenous people and other governmental structures noted above. At the same time, some Indigenous peoples have created their own ethical guidelines for researchers to follow, which can perhaps be even more important for cross-cultural researchers.

Well before going to the field, research with human participants conducted by researchers affiliated with universities or other research institutions can require ethical approval by institutional review boards, or IRBs. These review boards often use ethical guidelines published by professional bodies (e.g., American Anthropological Association, American Psychological Association, British Psychological Association, or the Deutsche Gesellschaft für Psychologie) as the basis for their assessment. Such reviews can be meaningful in thinking through certain procedures, especially those around data privacy and consent, although recommendations from the IRB may not always reflect the practical realities on the ground. For instance, even if there are dedicated ethical review boards for social science research, they may have limited experience with cross-cultural or field-based research and may—as a default—expect written consent, which at times may not be feasible or advisable in some contexts, where verbal consent is more suitable (e.g., because of limited literacy skills) or better aligns with local norms. In the United States, the federal policy in place that mandates IRBs does allow for non-written consent, but the board may need to be made familiar with this (https://americananthro.org/about/policies/statement-on-ethnography-and-institutional-review-boards/). Nonetheless, the researcher may feel that they are put into a situation of navigating between

two sets of obligations—to their institution and to the communities with whom they work. This can be worse at institutions that do not have dedicated review boards for social science research (psychology, anthropology, etc.). These may require researchers to submit their studies for review to institution-wide ethics boards that were often set up to deal with medical or invasive research. As a consequence, reviewers and boards may be unfamiliar with study procedures and approaches in psychological, behavioral, or anthropological research, and can feel more like an impediment than a service (Schrag, 2010).

Moreover, multi-site studies often pose additional challenges as ethical review may need to be sought from various institutions (in different countries) that may differ in their ethical review procedures and requirements. For example, consent forms or procedures that are acceptable to one ethical review board may not be acceptable to another. Together, these challenges can potentially delay ethical approval substantively due to the need for detailed explanations and revisions to ethics applications and, at times, negotiations with ethical review boards about appropriate research procedures. It is sometimes possible to streamline the ethical review process and submit 'umbrella' applications to the lead investigator's institution that cover all data collection sites and, once the lead investigator has received ethical clearance, to submit this for expedited review at collaborators' institutions. One needs to be mindful, though, when working in diverse cultural contexts and/or across multiple sites, of so-called 'ethics dumping' (Schroeder et al., 2018). That is, of engaging in research that would be deemed unacceptable in one's own country because legal and ethical frameworks are more lax in other settings (usually resource-poor settings). It is paramount that the highest ethical standards are applied across sites, and it is up to the lead researcher(s) to ensure such is the case.

Indigenous scholars have also noted how little institutional review boards procedures tend to protect vulnerable, Indigenous, or otherwise historically marginalized communities (Fournier et al., 2023; Hayward et al., 2021; Hedgecoe, 2016; Schrag, 2010;

Stark, 2012). Specifically, they argue that the potential impact of the research on the participants and their community is only considered insofar as it could open institutions to liability. This is emblematic of western individualistic cultural values, which often fail to capture an interdependent worldview that would prioritize the community (Tauri, 2018). The research ethics system as it is currently set up is void of the relational importance that is crucial to the research process, particularly in Indigenous communities that value interconnectedness (see Box 5.1). While institutionalized ethical approval procedures serve a role in encouraging and/or enforcing ethical behavior, they are also subject to the critique that research conducted on Indigenous communities that employs ethical standards drawn from the values of the Global North continues the "disrespect and psychological harm to communities, societies, and nations to which research findings are generalized or extrapolated" (Chilisa, 2019, p. 84).

Thus, approval from one's institutions should not be the final say in maintaining an ethical research practice, especially with regard to vulnerable populations such as children and marginalized groups. If your institution requires you to obtain the approval of an ethics council to do your research, we recommend doing what you can to fulfill your obligations to your institution in an open dialogue (figuratively and literally) with the ethical demands of your field site. In recent years, some Indigenous ethics codes have been developed to address the ethical concerns of peoples that have been colonized and marginalized, and these might also inform your approach to ethical research policies no matter where you work.

The Indigenous perspective on research ethics is complicated, as illustrated by Māori scholar Linda Tuhiwai Smith (2022, p. 1), when she states that "The word itself, 'research', is probably one of the dirtiest words in the Indigenous world's vocabulary. When mentioned in many Indigenous contexts, it stirs up silence, it conjures up bad memories, it raises a smile that is knowing and distrustful." Indigenous research codes have now been developed by the Assembly of First Nations in Canada (Assembly of First

Nations, 2009), the Australian Institute of Aboriginal and Torres Strait Islander Studies (AIATSIS) (Australian Institute of Aboriginal and Torres Strait Islander Studies, 2020), the Pūtaiora Writing Group for Māori research ethics (Hudson et al., 2010), and the South African San Institute (South African San Institute, 2017). The opening paragraph to the AIATSIS Code of Ethics for Aboriginal and Torres Strait Islander Research (Australian Institute of Aboriginal and Torres Strait Islander Studies, 2020, p. 11), highlights why there is a need for Indigenous ethics codes above and beyond 'conventional' ethical frameworks (e.g., IRBs):

> This idea of ethical human engagement has interested philosophers and thinkers across all cultures for all time. However, our best selves do not always prevail. For Indigenous peoples, the ongoing experiences of colonisation, theft of lands and resources, disruption to societies and families, and suppression of culture and identity, is a denial of human dignity and respect. When done well, research can, and has, had positive impacts for Indigenous peoples, but research has not been immune to practices that are imbued with racism, exploitation and disrespect.
>
> While conventional ethics frameworks emerge from the obligation to respect individual human dignity and protect the vulnerable, the ethical principles underpinning this Code proceed from a presumption of Indigenous authority as self-determining peoples, and as rights holders, whose knowledge and contribution to research must be recognised, respected and valued. This does not mean that individual Indigenous people may not be vulnerable as a result of their personal circumstances, and indeed may be more vulnerable due to the impact of colonisation, racism and intergenerational trauma.

Researchers who work with communities and in sites where ethical codes of conduct do not (yet) exist, can familiarize themselves with the existing Indigenous codes of conduct as they will offer invaluable guidelines for how to engage communities in a respectful and ethical way. Research departments that engage with cross-cultural research may also consider drafting codes of conduct that provide detailed guidance on good and ethical practice (for a recent example, see Bruno et al., 2022 and Box 5.2).

Box 5.2 Experiences with international/multicultural teams

Cross-cultural research is best accomplished by combining multicultural skill sets and expertise. Teams may consist of scientists and students from diverse backgrounds as well as local research assistants and support staff, who may themselves come from several different cultural traditions. It is important to not only recognize the strengths of multicultural research teams, but also the challenges of working in a group where language, customs, taboos, even diets may vary considerably. This is especially pertinent when field conditions require team members to both live and work in close proximity for weeks or even months. Providing training and resources for all team members to minimize misunderstandings and interpersonal conflicts can be critical to the success of a field season.

Multicultural team leaders might consider:

- Providing incoming team members with an Orientation Document with information about the existing research site and team. This should include relevant information about the history, politics, and climate of the country/region, as well as an overview of the specific community, such as the names of community leaders, descriptions of customs and taboos, logistics resources such as a packing list, and a typical workday timeline.
- Implementing a Code of Conduct that covers the research team's general approach (e.g., make informed, locally appropriate decisions; engage with community subsections equally; treat others with respect) and makes explicit the team's policies on discrimination, bullying, fighting, theft, dishonesty, and harassment. It should also make

clear any specific policies regarding interpersonal conflicts or romantic relationships within the team, or between the team and community members. It is important that it includes contact information for (ideally independent) people, in addition to the team leader, that can provide support, as well as ways in which conflicts of interest may be identified and addressed in conflict resolution. Finally, it should detail the team's policy on the acquisition and use of media collected during the research process with specific guidance on asking permission and obtaining consent for external use. This document should be agreed upon and signed by all team members, including the team leader.

- Regularly checking in with team members about their health (physical and mental), which will require learning the culturally appropriate way of doing so (e.g., Is this a private matter? Is physical health understood as reflecting mental health?).
- Coordinating recurrent team building and leisure activities throughout the research period (e.g., movie nights, card games, football games, or other appropriate activities).
- Organizing a debrief meeting at the end of the research period that can be used to recap what parts of the field season were difficult, fun, interesting, learning experiences, etc., and might be followed up with a more formal Debrief Document which could be used to inform the team leader about any potential conflicts and provide feedback for future seasons.

Leading or working in a multicultural team requires that each member is treated with respect, adequate resources

are provided to prevent potential conflicts, and all issues are carefully considered through appropriate cultural lenses. When in doubt, talk to your team members!

Example Codes of Conduct:

https://www.povertyactionlab.org/page/code-conduct-j-pal-community

https://www.hfedlab.com/opportunities

Designing a budget

Research project budgets are naturally highly specific to the needs of the work one is doing, and often constrained or guided by the policies of the institution funding the project (or that one hopes will fund the project). However, as the budget is the document that reflects the resources one is leveraging to conduct research, one cannot escape cultural and ethical considerations in designing how funds will be spent in the context of doing research with children and their families. Such considerations are most pronounced when the researcher works in relatively low-resource settings, or those with minimal integration in cash economies—settings where one's presence alone reveals the relatively significant resources that must have already been expended to bring the researcher to the community—but they are not restricted to such settings. How money is used in specific cultural contexts can have major implications for the researcher's scientific and relational aims. In particular, we will highlight two budgeting issues that require consideration of the particular cultural and geospatial contexts of the research setting: participant and community compensation and the health and safety of the research team.

Participant compensation is standard practice and should be budgeted for. However, in practice, it is not always straightforward to implement; for instance, if the study design involves a sampling technique that means only some people are eligible to participate.

This raises the question of whether only those people will be compensated. When working with small communities, this may create jealousy. One of us (AB) had such an experience doing doctoral work with hunter-gatherer and subsistence farmer children in the Congo Basin, where the sampling process meant 'working with' some children but not others. While only some children may have been the subject of the study, the actual methodology—observations of everyday life—meant time was spent with all of the children who were present in the social group of the 'subject.' From the children's perspective, they were all involved in the research, and indeed they were. Thus, ethnographic knowledge—not only the target sample size—must inform how much money is spent on compensation.

Additionally, in this same example, it was completely appropriate to give gifts—not cash—to the children directly as compensation. In the hunter-gatherer culture under investigation, children are given significant autonomy (e.g., Boyette, 2019; Boyette & Lew-Levy, 2021; Hewlett et al., 2011) and it would not make ethnographic sense to compensate the parents for their children's time (though parental consent was sought). In contrast, among the farming community, parents, especially fathers, decided how resources were to be distributed in the family, and it was most appropriate to provide compensation to the participating children's parents (Boyette & Lew-Levy, 2019). Moreover, through discussion with local interlocutors, it was decided that compensation for the participating farmer families was to be cash, and not gifts, as cash was more deeply integrated into their economy. While compensation was relatively equal, it was a challenge in this case to avoid jealousy within and between groups. Fortunately, the budget had been sufficiently flexible to accommodate these dynamics and to reduce jealousy. While this is a highly specific research context, it illustrates the ways in which ethnographic knowledge can inform budgeting, and, depending on whether participant compensation is in the form of gifts or cash, can facilitate planned expenses.

In later research in these and similar communities, the researchers elected to provide a larger gift to each household in recognition that, even if work was being done with children, the

impact of the research was felt by the family and the community more widely. Such decisions were based on accumulated experience and continual discussion with local communities. Moreover, because this research program involved repeated visits, community compensation was also integrated into project budgets in order to compensate for the researchers' continued disruptions of community life—no matter how minor or how welcome. For some communities, this involved a 'right to research' fee, which was given publicly to the community leadership council, and for others, community projects were requested as compensation. Such expenses ought to be treated as programmatic necessities of the research project, based on a principle of generalized reciprocity.

While budgets typically include, at a minimum, line items for each of the scientific and logistical necessities of a research project, the researcher should also feel obliged to consider their own wellbeing and safety and that of their team during the project. Without researcher health, there is no research. Wellbeing and safety concerns certainly vary between research sites, and what are allowable expenses may depend on funding sources. However, preventive medicine (e.g., prophylaxis), emergency travel, and first-aid supplies are all reasonable and potentially critical line items to budget for during field research. Researchers working in contexts where health insurance is not socialized or mandatory should also consider whether their research assistants are insured against any injury or other harms that might result from their participation in research projects. Lastly, in fieldwork contexts, budgeting funds for communication with home—with families as well as home institutions—is more than reasonable and can be essential to wellbeing and safety.

Risk and safety

In the social sciences, there have been few attempts to systematize the issue of risk in fieldwork (e.g., Howell, 1990; Rudzki et al., 2022 for the sciences in general), although several well-known researchers have developed personal strategies from their own accumulated experiences across multiple jobs in high-risk contexts

(Goldstein, 2014; Ice et al., 2015; Jamieson, 2002; Martin-Ortega & Herman, 2009; Westmarland, 2002).

More recently, Boisen (2018) takes up two strategies—acceptance and the ethnographic approach (Goldstein, 2014)—as two methods for improving safety in fieldwork. As already discussed (see Section 5.2), building sufficient trust with the community through good rapport is critical to successfully conducting fieldwork and generating data (Taylor & Bogdan, 1996). However, as an acceptance-based security strategy, this rapport can also function as one of the researcher's most important security resources in complex environments (Boisen, 2018). Working on rapport in uncertain settings, however, is not without complications. Goldstein (2014) is highly successful in pointing out that rapport development is particularly difficult in contexts with high levels of violence. For this reason, it has been pointed out that in such contexts it is important to be extremely vigilant in identifying or creating the field role (Brown, 2009; Lee, 1995; Sluka, 1995). In this vein, Sluka (1995) emphasizes the importance of avoiding at all costs the assignment of a role that may be seen as a threat to those you work with, and actively seeking to fit into safer and more accepted roles in the community (as cited by Boisen, 2018).

Some authors refer to this method as a basic strategy to deal with an insecure environment. Goldstein (2014) calls this an ethnographic approach. This can also be understood as a strategy of imitation, adoption, or emulation, based on the researcher's ability to observe local behaviors and adopt them to reduce the risks they face. Similarly, based on his fieldwork with street children in Brazil, Kovats-Bernat (2002) emphasizes the need to develop what he calls localized ethics, which consists of following the advice and recommendations of local people (or your collaborators, if you are working with more experienced outsiders, see Section 5.2) regarding the issues one should be prudent not to discuss with others and, furthermore, adopting local behaviors to protect oneself and those around one in fieldwork.

The issue of risk in fieldwork concerns not only unsafe environments, but also the risks posed by the enormous inequalities and access issues facing researchers in the field. The recent scope of

publications, news articles, and discussions about the widespread prevalence of inequities and safety risks in fieldwork suggests that there is a clear and urgent need for institutions to address how to make fieldwork safe, accessible, and welcoming for all (Demery & Pipkin, 2020; Jha, 2021; McGill et al., 2021; National Center for Science and Engineering Statistics, 2017; Olcott & Downen, 2020; Viglione, 2020). For researchers with marginalized identities, such as racial and ethnic minorities, researchers who are caregivers, researchers with disabilities, or those who identify as lesbian, gay, bisexual, transgender, queer, intersex, asexual, or with another sexual orientation or gender identity (LGBTQIA+), field experiences are more likely to be negative, hostile, or dangerous, and they may experience additional disadvantages due to intersecting identities (Clancy et al., 2017).

Boisen (2018) suggests incorporating risk analysis and assessment tools into the planning phase to enhance the ability to prevent and mitigate risk in fieldwork and provide elements to appropriately weigh acceptable levels of risk in projects. Incorporating these analysis and risk mitigation procedures in the planning phase and during fieldwork will help to improve the researcher's safety conditions and, consequently, the successful implementation of the research project.

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