Reflexivity in Research Methods: Boundary Theory and the Researcher Role Continuum

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Agenda

• Overview thoughts
• Reflexivity & positionality
• Insider/outsider research
• Liminal research
• Boundaries
• Researcher role continuum
• Examples
• Applying it to y(our) research
• Q&A
The Gist

• Each researcher is inescapably linked to their research project.
• Yes, that includes you.
• So, let’s be open about that and consider the consequences.
• We can be more sophisticated about our reflexivity by considering the degree of integration between ourselves and our projects.
• Trinity Church, Boston
Researchers are closer to their projects than they appear!

- Valley of the Gods, SE Utah
- I didn’t take this one 😊
A Selfie World
• Your research project is – to some degree – a “selfie”. You are reflected in it.
Reflexivity & Positionality

• Reflexivity = examining (1) yourself as researcher and (2) your relationship to the research
  • Examining one’s biases, ‘conceptual baggage’
  • “Thinking about how our thinking came to be” (Haynes, 2013)
  • Interpretation (of data) and reflection (of the researcher and their interpretation) (Alvesson & Sköldberg, 2009)

• Positionality = your stance/position in relation to the group/entity you’re studying; how your background shapes your identity and therefore shapes your view on population studied

• Rich research traditions call for meaningful levels of researcher reflexivity (Alvesson & Sköldberg, 2009; Cunliffe, 2003; Eden & Huxham, 1996; Haynes, 2013; Spradley, 1979)

• Often emphasized in qualitative, less so in quantitative (bummer!)

• Cunliffe (2003): “we need to go further than questioning the truth claims of others, to question how we as researchers (and practitioners) also make truth claims and construct meaning. This assumes that all research, positivist and anti-positivist, is constructed between research participants (researcher, ‘subjects’, colleagues, texts) and that we need to take responsibility ‘for [our] own theorizing, as well as whatever it is [we] theorize about’ (Hardy & Clegg, 1997: S13).”
Types of Reflexivity (Haynes, 2013)

• Theoretical reflexivity – what are the theories, preconceptions, assumptions we are bringing?
• Methodological reflexivity – methodological position and particular methods might be revised; ethics and power relations in data collection might come to light
• Ontological reflexivity – our perception of the nature of reality, especially in contrast to research participants & other researchers
• Emotional reflexivity – use your emotions as data to understand how you are experiencing/interpreting data
• Cultural, social, political reflexivity – where are you and how affect interpretation?
• Subjective reflexivity – researcher as subject and object; could be direct (in-depth experiences) or indirect (brief experiences)
Reflexivity & Positionality

• Example from our own research on Episcopal Church & clergy
  • Kreiner, Hollensbe, & Sheep (2006, 2009); Kreiner, Hollensbe, Sheep, Smith & Kataria (2015)

• We came from different religions & routinely discussed:
  • How our faith was affecting the interpretation of data (e.g., more liberal vs. conservative interpretations)
  • How getting to know Episcopal Church informed our understanding of our own churches (e.g., putting doctrines/policies into bold relief; I liked Episcopal music better than my church)
Insider/Outsider Research

• Bartunek and Louis’ (1996)
  • Discussed “marginality” as researcher
  • Laid a foundation in the organizational sciences for understanding several important pros and cons for being an insider to one’s own research

• Example of discrete ‘insiders’ and ‘outsiders’ in a study: Gioia, Price, Hamilton, & Thomas (2010)
  • Jim Thomas was founding dean as ‘insider’ to the IST college being studied, but also a former management professor
Liminal Research: Beyond Simple “Insider”/ “Outsider” Dichotomy

• Liminality refers to the state of being “betwixt and between” (Turner, 1967)
• Liminal research binds the researcher to – without belonging to – the studied population
• “Liminal researcher” (Kreiner & Joshi, in press, AMP) – our term for dwelling on the boundary of the group or phenomenon being studied
• Neither fully in nor fully out of the entity or topic of interest
• E.g., studying one’s former professions or organizations, groups for which one advocates but is not a member of, or groups that are familiar to us because of close personal connections
Boundary Theory

- Can help us understand liminal research and regular research
- How individuals and collectives create, change, or maintain the boundaries of various socially-constructed domains and entities in order to better understand the world around them (Nippert-Eng, 1996; Zerubavel, 1991)
- Domains examples
  - Home vs. work
  - Identity 1 vs. identity 2
  - Team vs. organization
  - Professional vs. personal
  - Research realm vs. studied population
Boundaries

- Boundaries mark the physical and/or cognitive edges and scope of a given domain
- Vary in terms of “thickness” and “permeability” (Hartmann, 1991)
  - **Thick** boundaries = strong, closed to influence, and divide aspects of categories
  - **Thin** boundaries = weaker, open to influence, and merging aspects of categories
- Integration vs. segmentation (Kossek & Lambert, 2005)
  - Integration = blending or combining of elements across a domain
  - Segmentation = separation of those elements between one domain and another
  - Pros/cons to each (Ashforth, Kreiner, Fugate, 2000; Kreiner, Hollensbe, and Sheep, 2006)
Crossing the Boundaries

• Most domains are not fully segmented from one another, especially given the interdependencies of life

• A researcher’s personal and professional life would not be said to be fully separate, for example, since the researcher carries cognitions, emotions, behaviors, and experiences from one area of life to the other, albeit to varying degrees

• “Spillover” focuses on what does end up moving from one domain to another (Barnett, 1994; Kanter, 1977)

• “Carryover” reflects the process in which a person experiencing an emotion (e.g., stress or joy) or cognition (e.g., problem or opportunity) in one domain contributes similar emotions or cognitions to people in the other domain, (Leiter & Durup, 1996)
Applying to Y(our) Research

• We may speak of how research might be viewed as segmenting or integrating two parts of the researcher’s life – personal and professional

• Does a researcher attempt to take a “white lab coat” physical science approach (highly segmented) or infuse oneself into their research (highly integrated?)

• Can we even accomplish the white lab coat approach if we tried? (Spoiler alert: no)

• A difference in the *contrasts* between personal and professional roles. Each of these worlds has different contexts, norms, players, and value sets which may contrast slightly or greatly in comparing the two domains (Ashforth et al., 2000).
Segmented versus Integrated Researcher Role Continuum

Segmented Roles (Traditional [False] Research Mentality)
- High perceived contrast between personal and professional role “content”
- Inflexible and impermeable boundaries between personal and professional roles

Hybrid Roles (Where Most Research Is)
- Moderate contrast between personal and professional role “content”
- Semi-flexible and semi-permeable boundaries between personal and professional roles

Integrated Roles (E.g., Personally Meaningful or Insider Research)
- Low contrast between personal and professional role “content”
- Flexible and permeable boundaries between personal and professional roles

Note: adapted from Kreiner & Joshi (in press at AMP) & Ashforth, Kreiner & Fugate (2000)
Integrated Roles: Research Area Example 1

• Workers with Intellectual Disabilities
• My 21 yr old daughter was born w/ Down syndrome and so I’ve been in the disability world for 21 years
• Co-author (Aparna Joshi) has 19 yr old son on autism spectrum
• Co-author (Christine Mihelcic) served as a counselor for students with I/DD
• Other co-authors w/o direct personal experiences with PWD
• A chance (or call?) to integrate personal and work lives as well as our research streams (stigma, identity, diversity, etc.)
• A few different papers at various stages... challenges of being PWD at work
  • Sociality
  • Job coaches
  • Social enterprises for PWD
  • Transition from school to work...
Example Study:
Transition from School System to Workplace

- My daughter is the one lounging on the Nittany Lion 😊
Integrated Roles: Research Area Example 2

- 3 articles from Penn State Jerry Sandusky / Joe Paterno scandal

1. Paper looking at media analysis of Joe Paterno’s fall from grace (in press, *AMD*; Bishop, Treviño, Gioia, & Kreiner)
   - Position: most “distant” of the 3; could have been written by non-PSU folks

2. Paper examining alumni data about their emotional and identification responses to scandal (*AMJ* 2018; Eury, Kreiner, Treviño, & Gioia)
   - Position: middle of the road – very emotive for us but we didn’t write about ourselves

3. Paper examining our own roles as researchers in the process (in press, *AMP*; Bishop, Eury, Treviño, Gioia, & Kreiner)
   - Position: highly reflexive, focused on ourselves
Benefits of blurred boundary

• “Prolonged engagement” – key to research rigor (esp. in qual)
• Know whom to talk to inside system
• Personal meaning $\rightarrow$ intrinsic motivation / personal passion beyond typical “intellectual curiosity”
• Boundary dweller – seeing both inside and outside
• Our own “liminal status” as semi-insider helps pull us out of a fully insider perspective
• Low “transition costs” from one domain to other
Challenges of blurred boundary

• Blurs personal/professional boundary
  • Do “boundary work”

• Blurred roles – what hat to wear right now?

• “Being native” as opposed to “going native”
  • Keep track of insights, thoughts; get outsiders involved

• Emotionally taxing
  • “It would be too draining for me” – PSU colleague
  • Be mindful of your own wellness
Advice

• Ask, “Where Am I on the Continuum?”
• Consider how to leverage the “pros” and mitigate the “cons” where you are
• Ask, “should I move more toward integration or segmentation?”
• Use “boundary work” tactics (Kreiner et al., 2009)
  • Involve other people to help negotiate boundaries
  • Leverage technology (e.g., files, social media)
  • Manage the “when” of the work
  • Find respite
  • Set expectations – w/ co-authors, those you study
  • Manage physicality – e.g., the “where” of work & artifacts
How to Increase Reflexivity – Even in Quantitative Studies

• Recognize HOW/WHEN you ARE a part of the story
  • Deciding variables, items, wording, sample, etc.

• Consider how research process affected by (1) your particular ontological stance & (2) your particular favorite literatures/theories
  • E.g., as an interpretivist, as an identity scholar

• Co-author conversations
  • Discussing each others positionality

• Asking those in the population study
  • How am I different? How am I seeing you differently?
How to Increase Reflexivity – Even in Quantitative Studies

• Keeping a research reflection journal
  • Key decisions: why?
  • How your pet theories/literatures/culture/personality affect your approach

• Notice & keep track of surprises (e.g., different answers, results)
  • Query how your approach primed you & might affect interpretation
  • Sutton & Rafaeli AMJ 1988 fun example & their chapter

• Consider bi-directionality (Attia and Edge, 2016):
  • Prospective: your affect on study
  • Retrospective: effects of study on you
Thanks!
Identity research – who are we and how does it show up in our research?

• How might boundaries inform our understanding of how various roles (such as researcher/professional and parent/personal) can be combined?

• E.g., Ramarajan (2014) network metaphor for various personal identities (the “interpersonal network approach”), noting that the various ways that identities are connected can be thought of in terms of network analysis.
  • Closely coupled identities (e.g., roles that are similar in functions/tasks or constructed similarly by the person) would be interrelated such that a change in one role/identity is more likely to affect the other.
  • So, if research domain and researcher personal life are closely coupled, there will be more spillover and carryover

• E.g., Duberley & Carrigan (2013) explored how women merged their roles as mother and entrepreneurs as “mumpreneurs” – blending the identities of “nurturing” (from the role of mother) and “business-like” (from the role of entrepreneur)