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Nine Rules of Engagement: Reflections on Reflexivity

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Nine Rules of Engagement: Reflections on Reflexivity

Abstract

Wishing to be reflexive, to critically examine our assumptions, is easy. Doing it is less so. For researchers doing a study in their own professional field, it represents a particular challenge. In this essay, I explore this challenge using my own study as exemplar. I am researching workplace inclusion of workers with intellectual disability. As a professional, I have worked with and for people with intellectual disability for many years. The knowledge I bring to my inquiry – about the inabilities, vulnerabilities and needs ascribed to persons labelled thus – is deeply entrenched in common culture, as well as in my professional training. How can I handle this knowledge in my research? To what extent may, or must, it command my perceptions and interpretations? How may I challenge and look beyond it? Exploring this, I consult a handful of researchers who have examined pitfalls of involving informants with intellectual disability in research. I also call upon four giants of social science – Hans-Georg Gadamer, Charles Taylor, Pierre Bourdieu and Michel Foucault – as well as Brian Eno, British musician and producer extraordinaire. Departing from a concrete situation, the essay winds its way through nine discussions, each generating a “rule of engagement.” Although the discussions are specific to my project, these nine methodological suggestions, ranging from seemingly trivial to decidedly non-trivial, are not. My belief is that they may hold some interest for any qualitative researcher.

Keywords

Intellectual Disability, Heterotopias, Philosophical Hermeneutics, Reflexivity, Qualitative Research

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Nine Rules of Engagement: Reflections on Reflexivity

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Wishing to be reflexive, to critically examine our assumptions, is easy. Doing it is less so. For researchers doing a study in their own professional field, it represents a particular challenge. In this essay, I explore this challenge using my own study as exemplar. I am researching workplace inclusion of workers with intellectual disability. As a professional, I have worked with and for people with intellectual disability for many years. The knowledge I bring to my inquiry – about the inabilities, vulnerabilities and needs ascribed to persons labelled thus – is deeply entrenched in common culture, as well as in my professional training. How can I handle this knowledge in my research? To what extent may, or must, it command my perceptions and interpretations? How may I challenge and look beyond it? Exploring this, I consult a handful of researchers who have examined pitfalls of involving informants with intellectual disability in research. I also call upon four giants of social science – Hans-Georg Gadamer, Charles Taylor, Pierre Bourdieu and Michel Foucault – as well as Brian Eno, British musician and producer extraordinaire. Departing from a concrete situation, the essay winds its way through nine discussions, each generating a “rule of engagement.” Although the discussions are specific to my project, these nine methodological suggestions, ranging from seemingly trivial to decidedly non-trivial, are not. My belief is that they may hold some interest for any qualitative researcher. Keywords: Intellectual Disability, Heterotopias, Philosophical Hermeneutics, Reflexivity, Qualitative Research

Start

The young man with intellectual disability and his workplace mentor are being interviewed on stage in front of approximately 700 conference attendees. Both are participants in a project that aims to stimulate ordinary workplaces to hire and accommodate workers with intellectual disability – “ordinary” meaning workplaces established to produce or sell goods or services, not to provide work or work training for particular groups. The need for such projects, in Norway as in other parts of the world, arises, on one hand, from the common characteristic of intellectual disability – namely, limitations in “reasoning, problem solving, planning, abstract thinking, judgment, academic learning, and learning from experience” (American Psychiatric Association [APA], 2013, pp. 31-33) – and, on the other, from the ongoing trend towards an ever more knowledge intensive labor market with higher expectations of productivity and fewer manual tasks.

The hotel where the conference is held is in the process of hiring nine employees with intellectual disability – of which the young man is one. He is halfway into his initial four-week trial period. Asked by the interviewer about his duties, he describes how he starts each morning by sweeping the pavement outside the hotel. “And yesterday,” he says, “I was hosing down emergency exits, really enjoying myself.” The audience laughs. The interviewer comments: “That’s great, lots of people dream of hosing down emergency exits,” and proceeds: “But tell me, your mentor – is he all right? I mean, in many places there are bosses and colleagues of whom much might be said. How is it here?” Listening to the exchange, I am thinking that the interviewer is talking too much, too fast, not giving the young man sufficient time to respond.

Yet, he responds: “I think he’s a nice chap.” Again, the audience laughs.” And I think *he*’s an eager chap,” his mentor says: “The other day, there was quite a lot of litter on the pavement. If I hadn’t stopped him, he would have swept the pavements all the way down to the concert hall.” The audience laughs again, giving the young man a big round of applause.

I was in the audience, laughing and applauding with them. The mood was positive and supportive, the laughter good-natured. Still, I found some aspects of this exchange troubling: If the comment “lots of people dream of hosing down emergency exits” had been directed to someone without intellectual disability, would they not have found it condescending? Also, does it not offend common and professional propriety to publicly ask the young man, still in his probationary period, what he thinks about his mentor, to whom he is subordinate? And thirdly, why does his eagerness, the prospect of him sweeping the pavements “all the way to the concert hall” seven blocks away, garner such merriment and applause? Had he been an “ordinary” employee (i.e. without an intellectual disability), would it have elicited the same reaction? And, if not, what perceptions of intellectual disability, what prejudices, may explain the difference?

My reactions are normative as well as critical. They reveal that I consider some ways of interacting with people with intellectual disability more proper than others – as well as my bent towards critical reflection: the examination of how culturally embedded and historically determined discourses may impact on people’s lives, for example by naturalizing perceptions of who they are, of what they are capable, and what roles they can fill. This stance is informed by my professional background as a social worker, specialized in designing supports to people with intellectual disability, as well as my postgraduate studies in community work with a focus on representations of disability, conditions for participation, and social justice. For me as a researcher though, it creates dilemmas: I enter a field where actors cannot be expected to share my perspectives on intellectual disability, nor the implications of different discourses on inclusion. However, to see inclusion as a form of social justice makes it more than an academic issue, by bringing in moral implications with the potential to create ethical and methodological pitfalls in any research process. Interviewing informants with intellectual disability, as I aim to do, creates more, as I will expand on later. But behind these issues, even more fundamental theoretical questions loom: Are not the perceptions and values upon which my normative, critical stance builds also expressions of prejudices? One of my challenges as a researcher concerns how to handle the knowledge of my professional training. To what extent may, or must, it command my perceptions and interpretations? And, if it is so ingrained in the ways I interpret, that it must be considered an integral part of the means by which I see – how may I hope to look beyond it? Such are the questions I explore in this essay. A key concept is *reflexivity* – which can be understood as a “process of critical self-reflection on one’s biases, theoretical predispositions, preferences, and so forth” (Schwandt, 2015, p. 268). This is my point of departure.

Theoretical Predispositions

What *are* my theoretical predispositions? Looking back at my publications from the last decade, I would say my strongest theoretical predispositions lie in:

- a) The belief that the cognitive impairment inherent to intellectual disability creates a need for adapting social aspects of environments to enable participation, for instance making sure information is available in a form the person understands, avoiding using too complex terms in communication, and giving the person sufficient time to respond.

- b) The precepts of the “social model of disability” (Oliver, 1996), that portray such adaptations, on societal as well as individual levels, as a form of social justice.
- c) The idea that functional differences should not automatically be seen as deficits, but in many cases can be considered legitimate and valuable expressions of human diversity.

On one hand, these predispositions enable a clearer perspective on the role of the environment in promoting accessibility, citizenship and agency. On the other, they entail a normative bias, projecting a responsibility onto actors who interact with the person for adapting their behavior according to his or her needs – responsibilities to which these actors may not agree or accept. The danger is of ending up with better collaborations with informants with predispositions that resemble my own, getting richer data from these cases than from cases where informants to a lesser extent understand the situation and their role as I do. This is a scenario that would provide the least opportunity for me to discover anything, to learn something, to transcend my existing perceptions. Thus, in my research, I should also build in “checks and balances” on the tendency to favor some cases. For instance, I could at regular intervals ask myself why I find certain cases more interesting, challenging myself to keep exploring any cases I consider less interesting. Some cases may in fact be less relevant, but if so, I should make sure I drop them for lack of relevance, and not because the informants’ understandings are at odds with mine. Thus, my first “rule of engagement” reads:

1. *Pay sufficient interest to the “uninteresting” cases.*

Interview Inquiries as Moral Enterprises

Another aspect is that theoretical models of disability are not “morally neutral.” Traditionally, the exclusion of people with impairments, for instance from employment, has been perceived as an unfortunate, but highly natural, consequence of their impairment (Oliver, 1996). Accordingly, regarding people with intellectual disability, many might attribute their meager success in domains such as schools or the labor market to their cognitive impairment alone. As a reaction to such dominant and largely taken-for-granted perceptions, a cornerstone of the “environmental turn” that lies at the very heart of Disability studies was a 1976 declaration by the UK activist group Union of the Physically Impaired Against Segregation (UPIAS). One paragraph reads:

In our view, it is society which disables physically impaired people. Disability is something imposed on top of our impairments, by the way we are unnecessarily isolated and excluded from full participation in society. (UPIAS, 1976, p. 4)

Proceeding from this, for a person with cognitive impairment, disability may arise when s/he meets inappropriate expectations of information handling or problem solving – for example, when other people talk inappropriately fast, using inappropriately complex terms, or the person is overwhelmed by the operation of a ticket vending machine that a majority of people would understand. The social model has been hugely successful, at least on a policy level. For instance, the United Nations’ Convention on the Rights of Persons with Disabilities (CRPD) describes disability as a result of “interaction between persons with impairments and attitudinal and environmental barriers that hinders their full and effective participation in society on an equal basis with others” (UN, 2006). Albeit somewhat weaker than the UPIAS statement, this

definition still shifts the gaze from solely focusing on the impairments, to including environmental factors in the picture – factors that may be changed in order to enhance participation. Thus, it is a hopeful message, but a message that must be understood and acted on. It is likely that I will come across actions on the part of employers, supervisors or colleagues that easily may be interpreted as barriers – for instance if they lack the will or ability to adjust their modes of communication sufficiently. If so, I will have a dilemma on my hands. On one hand, given the normative, critical stance that I described above, it is not farfetched to think that I, during interviews, may come to act or react in ways that suggest I find something lacking in how they act and interact with their employees with intellectual disability. I have been trained in a health and social tradition of beneficence: doing good, and of non-maleficence: minimizing harm. The last aspect may be particularly at stake here. An “interview inquiry is a moral enterprise,” Kvale and Brinkmann (2009, p. 62) write, one of the salient ethical issues being “personal consequences of the interview interaction” such as “changes in self-understanding” (Kvale & Brinkmann, 2009, p. 63). Per se, employers, supervisors or colleagues cannot be considered a vulnerable group. Still, to receive what they experience as negative feedback from a visiting researcher may threaten their wellbeing, and not least, perhaps curb their enthusiasm for creating this job for an employee with intellectual disability – an enthusiasm which may be main reason the job exists at all. Thus, my second “rule of engagement” is:

2. *Be respectful of those who are willing to engage with us.*

This may seem mundane. However, more important than appearing respectful, is to *be* respectful. More than a mere superficial adaption of words and manners, this may require that we develop a fundamental and genuine wish to meet and respect our informants as sources of valuable information, no matter how their perspectives challenge us. Secondly, it may require that we take it upon ourselves to work through our perceptions, assumptions and emotions to the degree necessary to overcome that which may hinder us in being genuinely respectful.

Fields of Uncertainty

The origin of the word respect – the Latin *respectare* – means to “look again”: to review and perhaps reconsider. A good reason to look beyond the feelings and perceptions of employers, supervisors or colleagues – is that it is not they, but the employees with intellectual disability who are the most vulnerable parties in these settings. The limitations of the latter in reasoning, problem solving, planning and so forth do not render them powerless, but may influence their ability to analyze their interaction and experiences with others, to understand when others are making unreasonable demands or act in ways that are unhelpful, to understand what specific aspects of others’ actions are unreasonable or unhelpful and speak up. Also, if they are able to speak up, how articulate they are, how well they argue their case, and how susceptible the other person is to their point of view may differ. Another side of this is that they may be more vulnerable than most people to verbal persuasion, and to adopting the perspectives of others. A danger is that they may come to accept work conditions that they should not, and that most people, given similar circumstances, would not. What my response in such cases should be is hard to know now, detached from a specific situation. Kvale and Brinkmann (2009) refer to such issues as “fields of uncertainty”: Rather than seeing ethical questions as something

that can be settled once and for all in advance of the research project, we conceptualize them as *fields of uncertainty* (i.e. problem areas that should continually be addressed and reflected upon throughout an interview inquiry). (Kvale & Brinkmann, 2009, p. 69, emphasis in original)

Thus, the best I can do at present, is to be aware of this “field of uncertainty” and hope to be able to identify the dilemmas when they arise and take the steps that present themselves as the most right, or, as so often with dilemmas, the least wrong. My third “rule” reads:

3. *Identify the dilemmas. Look at both sides. Tread carefully.*

Some Pitfalls of Communication

However, regarding the vulnerability of employees with intellectual disability, any caveats that might apply to employers’, supervisors’, or colleagues’ communication practices, fully apply also to me. Interviewing employees, I plan to ask employees to let me participate in their daily activity, invite them to show and explain their tasks to me, which also gives me an opportunity to observe them, our interaction, their interaction with other people, as well as ask questions. But what methodological and ethical challenges may arise from involving people with intellectual disability as informants?

Sigstad (2014, p. 189) warns that the “difficulties in communication” that people with intellectual disability often experience present particular challenges to research. Referring to previous research, she notes that such difficulties may related to understanding grammatical structures and concepts, formulating appropriate responses within a specific context, and the asymmetrical relationship between researchers and informants. An “essential question,” she writes, “is whether the difficulties of informants affect interviews to such an extent that the reliability and validity of the results are weakened” (Sigstad, 2014, p. 189). Both reliability and validity are epistemic criteria in research – criteria “concerned with justifying knowledge claims as true, accurate, correct” (Schwandt, 2015, p. 46). Reliability, establishing procedures and results as trustworthy, can be thought of as a necessary but not in itself sufficient criterion “for establishing the truth of an account or interpretation” (Schwandt, 2015, p. 270). And, regarding validity:

To say that the findings of social scientific investigations are (or must be) valid is to argue that the findings are in fact (or must be) true and certain. Here, “true” means that the findings accurately represent the phenomena to which they refer and “certain” means that the findings are backed by evidence—or warranted—and there are no good grounds for doubting the findings, or the evidence for the findings in question is stronger than the evidence for alternative findings. (Schwandt, 2015, p. 319)

Thus, Sigstad seems concerned with establishing “the truth of an account or interpretation of a social phenomenon,” by – as far as possible – overcoming the challenges to obtaining truthful answers from interviewees with intellectual disability.

What might prevent such truthfulness? One challenge is what has been described as a tendency in people with intellectual disability to acquiesce – “a form of compliance in which the informants respond according to what they believe is expected” (Sigstad, 2014, p. 192). Thus, one worry may be that informants say “yes,” prompting us to record “yes,” whereas the truth is something partly or wholly different. One of Sigstad’s sources is Finlay and Lyons (2002). Reviewing research on acquiescence, they refer to a series of studies by Sigelman and various colleagues in the 1980’s, that found a “systematic acquiescence bias in response to yes/no questions,” for “factual as well as subjective questions,” a bias that also seems to be “inversely related to IQ” (Finlay & Lyons, 2002, p. 15). Thus, lower IQ levels may correlate with a more pronounced acquiescence bias. Although there are unresolved methodological

issues around testing for acquiescence, the phenomenon seems well documented. However, Finlay and Lyons (2002, p. 14) claim: “although researchers often stress a desire to please or increased submissiveness as the most important factor, acquiescence should also be seen as a response to questions that are too complex, either grammatically or in the type of judgments they request.” Some of their suggestions are to reduce sentence complexity, ask for examples, establish “don’t know” as a legitimate option to “yes” and “no,” script prompts and alternate wordings with the same care as we script the initial questions, and avoid assuming that people with intellectual disability are in a position to provide immediate answers to any question we might ask (Finlay & Lyons, 2002, p. 23). Sigstad (2014, p. 197) also recommends using short questions and simple sentences. Thus, a fourth “rule of engagement,” which in principle may be seen to apply regardless of informant category:

4. *Prepare questions with care. Make sure they are sufficiently adapted. More important than what sense our questions make to us, is what sense they make to our informants.*

Establishing Common Understanding

Sigstad (2014, p. 198) also recommends allotting sufficient time to verify if interviewees understand the questions, and, more controversially, suggests it “may be necessary to assist the informants with suggestions for alternatives or to provide help with completing sentences using conducive questions or repetition” (Sigstad, 2014, p. 200). She provides an example, where she (I) interviews a secondary school student (S) with mild intellectual disability:

- I: What are you allowed to decide at school?
 S: I don’t know.
 I: Here at school, when you are in class, is there anything that you are allowed to decide?
 S: Yes. If we have time, so it happens that we are playing something.
 I: So that you can choose it?
 S: Yes.
 I: When you have spare time?
 S: Um.
 I: How do you like making decisions about what to do at school?
 S: Yes.
 I: Is it okay to decide on something?
 S: Um. (Sigstad, 2014, p. 192)

The exchange may be interpreted as showing acquiescence: Of six responses, five are affirmative. Four are single syllable affirmations, including answering “Yes” when asked “How do you like making decisions about what to do at school?” as if the “How” was either not heard, understood or acknowledged. This resonates with Finlay and Lyons’ (2002, p. 22) warning that sentences with modifying clauses may create problems with understanding. The exchange does not seem to include conducive questions. The question “When you have spare time?” follows directly from the “time” clause in the student’s single elaborated answer: “Yes. If we have time, so it happens that we are playing something.” The previous question, “So that you can choose it?” seems to follow from the reasonable inference that the student’s answer is a cognizant response to “in class, is there anything that you are allowed to decide?” The fullness of the student’s answer seems to strengthen that inference, and it may seem that a common

understanding has been established. Still, there are two perceptible leaps from what the student says at first, to the understandings, or meanings, that seem to be established: First, that the student in given situations is at liberty to choose to play (or what to play), and second, that s/he values this. The questions and answers seem to bridge these gaps, however, in each case, the substance of the “bridge” is still only based on one “Yes” and one “Um” on part of the student, with no further elaboration.

Nothing conclusive can be drawn from such a short excerpt. But it does illustrate that in interviewing people with intellectual disability, establishing a common understanding may require more projection on part of researchers, as well as needing to trust more tenuous links of meaning. If interviewees struggle with understanding grammatical structures and concepts, they also will be less able to pick up on any misinterpretations on the part of the interviewer and correct them. All this points to a need for supplementary sources in the interpretive work. Not to check the “truth” of statements – as Finlay and Lyons (2002) describe was done in early research on acquiescence, where participant answers were checked with caregivers in order to catch discrepancies that might betray acquiescence – but rather in the vein of Caldwell’s description of “dyadic interviewing”: The answers from informants remain the primary source, but in addition, informants identify key support persons who also may be questioned, their answers thus representing secondary, supplementary sources (Caldwell, 2014). Building on that, establishing *interpretive teams* around informants may be envisioned – teams where the person him/herself provides the main voice, but other team members fill in answers, contribute to catching and correcting misunderstandings, as well as teasing out what “the truth” of matters may be, to the extent that the informant is not in a position to settle this alone. Hence, my fifth “rule of engagement”:

5. *Consider if establishing interpretive teams may assist informants in assembling fuller accounts than they are able to provide alone.*

And again, in principle this may apply regardless of informant category: Even if informants do not have the specific difficulties of communication that people with intellectual disability may experience, we may still ask ourselves: Are there instances where informants’ accounts may benefit from inviting them to invite other parties to join them in the interview – not to supplant their own perspectives, but to supplement and enhance them?

The Question of Prejudices

At the same time, assuming that it is possible to establish any “true meaning” of informants’ utterances, through such or other means, may be a fallacy. Given that intellectual disability is a label that is applied in cases where people experience a reduced ability to think, reason and judge, we cannot take for granted that answers to all manner of “ordinary” questions exist. The person may not have the necessary concepts to grasp the matters we inquire about – because s/he has not had the opportunity to develop them, or because such concepts forever may be beyond his or her intellectual reach. This means that along a scale of increasing complexity, our interpretations may at some point so obviously become constructions, that they no longer can be called expressions of the person’s meaning. This is not to say that other interpretations are not constructions. Interpretations will always be sensitive to the extent and the quality of shared cultural meaning and linguistic practices of informants in communicative interactions. But in these cases, the line between what can reliably be assumed and what simply must be considered conjecture may appear sooner, as a result of interviewees’ reduced cognitive capacity.

There is another aspect to this: To the extent that interpretations are constructions, of what are they constructed? More precisely, what are the cultural and cognitive contributions of interviewers in creating meaning – contributions that together with interviewees' utterances form such links of meaning as can be called findings or data? And how can such contribution be reconciled with achieving satisfactory reliability and validity? Addressing this, Sigstad notes that researchers should "attempt to maintain distance from their own prejudices, which are often closely related to their own understanding of intellectual disabilities" (2014, p. 196). As a methodological recommendation, this portrays "prejudices" as a negative factor, a source of bias that, as far as possible, should be banished through sound research methodology. However, some scholars beg to differ:

The devotion to method as holding the key to sound inquiry is predicated on the assumption that we need some means of removing our tendencies as everyday human beings to be biased or prejudiced in our investigations of social life.... In light of this understanding of method, bias or prejudice is always defined negatively as something that interferes with, prevents, or inhibits having true, genuine knowledge. ... it is precisely this understanding of method and prejudice that is severely criticized by advocates of philosophical hermeneutics. (Schwandt, 2015, pp. 18-19)

A main focus in hermeneutics is conditions for understanding and interpretation. Its origins were in the study of historical texts, where the goal was to achieve interpretations of texts that as closely as possible re-experienced and re-created authors' consciousness, life and historical period (Thornquist, 2003, pp. 139-140). To achieve this, historians should attempt to "remove themselves" from the interpretative process: Hans-Georg Gadamer, one of the central figures of philosophical hermeneutics, refers to 19th century scholars Ranke, who described "the extinguishing of the individual" as the ideal, and Schleiermacher, who defined hermeneutics as "the art of avoiding misunderstanding" (Gadamer, 1977, pp. 5-7). Gadamer has no quarrel with the goal of avoiding misunderstanding, "to exclude by controlled, methodical consideration ... misunderstanding suggested to us by distance in time, change in linguistic usages, or in the meanings of words and modes of thinking" (Gadamer, 1977, p. 7). But he rejects the basic premise – that the

understander is seen ... not in relationship to the hermeneutical situation and the constant operativeness of history in his own consciousness, but in such a way as to imply that his own understanding does not enter into the event. But this is simply not the case. (Gadamer, 1977, p. 28)

Thus, one of the goals of philosophical hermeneutics is to rehabilitate the maligned concept of prejudices. To Gadamer,

prejudices, in the literal sense of the word, constitute the initial directedness of our whole ability to experience. Prejudices are biases of our openness to the world. They are simply conditions whereby we experience something – whereby what we encounter says something to us. (Gadamer, 1977, p. 9)

Following Gadamer, understanding *is* interpreting. There are no ways of understanding that bypass our prejudices, because our prejudices are the means by which we understand: This is the fundamental hermeneutic condition. And, related to science, this posits "the hermeneutical experience" as "prior to all methodical alienation, because it is the matrix out of which arise

the questions that it then directs to science” (Gadamer, 1977, p. 26). Hence, if our prejudices are the conditions by which we understand, no methodology can eliminate them. Rather, we must work with and through our prejudices – our preunderstandings – unveil them, “catch them in the act” so to speak, through hermeneutic reflection: “Reflection on a given preunderstanding brings before me something that otherwise happens *behind my back*,” Gadamer (1977, p. 38, emphasis in original) writes. And such reflection, he insists, “teaches us: that social community, with all its tensions and disruptions, ever and ever again leads back to a common area of social understanding through which it exists” (Gadamer, 1977, p. 42). One entry point to hermeneutic reflection may then be those experiences that seem alien, that provoke us, seem to offend a common or professional propriety – all manners of “friction” that may alert us to our own modes of preunderstanding, provide us with clues:

There is always a world already interpreted, already organized in its basic relations, into which experience steps as something new, upsetting what has led our expectations.... Only the support of familiar and common understanding makes possible the venture into the alien, the lifting up of something out of the alien, and thus the broadening and enrichment of our own experience of the world. (Gadamer, 1977, p. 15)

Thus, my sixth “rule of engagement” is:

6. *Value the upsetting, alien or offensive as unique sources of clues to our own modes of preunderstanding.*

Tensions, Disruptions and Conflicts of Interest

Gadamer refers to “tensions and disruptions” inherent in social community but emphasizes the “common area” which community “ever and ever” leads back to. Both he and philosophical hermeneutics has been criticized for overly relying on tradition, neglecting societal structures and the relationship between language and power (Thornquist, 2003, p. 172). Some supporters find this critique overstated: “To recognize the historicity of the knower does not contest the importance of attempts at critical interpretation, nor does it impair the operation of scientific understanding in the slightest,” Linge writes (in Gadamer, 1977, xviii). Gadamer himself does not exclude that the hermeneutic dimension has also “fundamental significance” for the “revolutionary consciousness that unhinges the tradition through emancipatory reflection” (Gadamer, 1977, p. 18). Yet, at the same time he states that “there would be no hermeneutical task if there were no mutual understanding that has been disturbed, and that those involved in a conversation must search for and find again together” (Gadamer, 1977, p. 25). Thus, one of the bedrocks of Gadamer’s hermeneutics still seems to be a notion that social community builds on a “common area,” forms of mutual understanding that may be disturbed, but also restored through mutual effort. This seems to overstate the commensurability of human interests, as well as understate the effect that the building blocks of “social community” may have on any “understander’s” room to reflect:

Social structures and cognitive structures are recursively and structurally linked, and the correspondence that obtains between them provides one of the most solid props of social domination. Classes and other antagonistic social collectives are continually engaged in a struggle to impose the definition of the world that is most congruent with their particular interests. (Waquant, 1992, p. 14)

The social model of disability is an example of such definitional struggle. In defining disability as a result of “interaction between persons with impairments and attitudinal and environmental barriers” (UN, 2006), the emphasis is shifted to the exclusionary effects of majority based “common areas” and “mutual understandings”: The assumptions of a societal majority, what most members take for granted as aspects of a more or less given reality, may result in disabling barriers for minorities with differing needs and functioning. The features of built environments that are understood as barriers – for instance stairs or curbs to wheel chair users – do not represent any “given reality” before adaptations. The environment is *already* adapted – to accommodate the needs and preferences of a societal majority, those who are “abled” by such planning and building practices. The question from a social model perspective would therefore not be whether or not a space is adapted – but *for whom* it is adapted. The same applies to what can be referred to as “ordinary” communication and conversation, that also does not represent any “given reality” before adaptations: It is already more or less adapted – to the needs and preferences of the majority, who are “abled” by such ways of communication. Hence, disabling barriers may not only be built, but also performed. In such case, “building them down” may require changes in social practices. This calls into question the will and ability of the majority to make adaptations to the scale necessary to fulfil such lofty and only partially defined goals as the “full and effective participation in society on an equal basis with others” (UN, 2006, n.p.) for persons with disabilities (Owren, 2013; Owren & Stenhammer, 2013).

Whether such goals are “fulfillable” or not, does not change the fact that actors may express differing interests, and that looking explicitly for tensions, disruptions and conflicts of interest that can be traced to social structures on levels beyond the cognitive structures of the actors themselves may be significant. My seventh “rule of engagement”:

7. *Look for tensions, disruptions and conflicts of interest between actors.*

Facilitating Rupture

Using political science as an example, Charles Taylor (1971, p. 22), writes about what he refers to as an empiricist “identification of acts by means of institutional rules. Thus ... leaving the room, saying or writing a certain form of words, counts as breaking off the negotiations.” His point is that actors may bring all sorts of beliefs, attitudes, feelings or goals into negotiations, and that these are phenomena on an individual, subjective level (Taylor, 1971, p. 27). However,

what they do not bring into the negotiations is the set of ideas and norms constitutive of negotiation themselves. These must be the common property of the society before there can be any question of anyone entering into negotiation or not. Hence they are not subjective meanings, the property of one or some individuals, but rather intersubjective meanings, which are constitutive of the social matrix in which individuals find themselves and act. (Taylor, 1971, p. 27)

Thus, intersubjective meanings on a level constitutive of social reality will only represent one of many ways a social reality may be constituted. What is considered hard fact in our culture may not exist within another. The dilemma he presents concerns the criteria of judgement in a hermeneutical science: How can we know our interpretations are correct? Presumably because they make sense. But such sense can only be made by referring to larger frameworks – which themselves in turn are premised on interpretations. If our interpretations are challenged, and

the challenger refuses to accept our attempts to make sense, we may have to give up (Taylor, 1971, pp. 5-6). Gadamer also touches on this, when he compares hermeneutics to rhetoric:

Rhetoric from oldest tradition has been the only advocate of a claim to truth that defends the probable, the *eikós* (verisimile), and that which is convincing to the ordinary reason, against the claim of science to accept as true only what can be demonstrated and tested! Convincing and persuading, without being able to prove – these are obviously as much the aim and measure of understanding and interpretation as they are the aim and measure of the art of oration and persuasion. (Gadamer, 1977, p. 24, emphasis in original)

Bourdieu also refers to this, writing about constructing the scientific object, the object of research: Such construction “requires first and foremost a break with common sense, that is, with the representations shared by all, whether they be the mere commonplaces of ordinary existence or official representations, often inscribed in institutions” (Bourdieu, 1992, p. 235). Such breaks with common sense may be in the form of *rupture*:

How are we to effect this rupture? How can the sociologist escape the underhanded persuasion which is exercised on her every time she reads the newspapers or watches television or even when she reads the work of her colleagues? The mere fact of being on the alert is important but hardly suffices. One of the most powerful instruments of rupture lies in the social history of problems, objects, and instruments of thought. (Bourdieu, 1977, p. 238)

Apart from tracing the social history – in my case, of the category intellectual disability, of practices related to intellectual disability, of exclusionary and inclusionary processes – Bourdieu has a suggestion on a methodological level to “guard against regression to the ‘reality’ of preconstructed social units”: Use a square-table. Enter the pertinent properties of cases, each on a separate line. Create a new column each time a new property necessary to characterize one of them is discovered and proceed to question all the other cases on the presence or absence of this particular property (Bourdieu, 1977, p. 230). Thereby, cases are questioned on something that does not spring from researchers’ prejudices – from what seems “natural” because it is aligned with our customary ways of thinking – but from a more systematic questioning that goes beyond researchers’ own associations. Still, the properties to be questioned are limited to the researcher’s existing mindset. Might one go further?

Gadamer refers to the possibility of unforeseen constellations – that within scientists’ experience, “it is not so much the ‘laws of ironclad inference’ ... that present fruitful ideas,” but “rather unforeseen constellations that kindle the spark of scientific inspiration (e.g., Newton’s falling apple)” (Gadamer, 1977, p. 13). So, what place do falling apples have in systematic inquiry? Can one plan for the unexpected, facilitate the possibly inspiring chance event, the hitherto unforeseen constellations? Here, we enter the turf of British musician and producer Brian Eno. Known for his collaboration with bands such as Roxy Music, U2 and Talking Heads, he is also known for *Oblique Strategies*, a deck of cards he designed with artist Peter Schmidt. Eno explains: “The idea of *Oblique Strategies* was just to dislocate my vision for a while. By means of performing a task that might seem absurd in relation to the picture, one can suddenly come at it from a tangent and possibly reassess it” (cited in O’Brien, 1978). The cards are designed to be picked at random. Three of these cards read: “Look closely at the most embarrassing details and amplify them,” and “Take away the elements in order of apparent non importance,” and “Discard an axiom” (Eno & Schmidt, 1979, in Marshall & Loydell, 2016). Eno explains further:

When I work there are two distinct phases: the phase of pushing the work along, getting something to happen, where all the input comes from me, and phase two, where things start to combine in a way that wasn't expected or predicted by what I supplied. Once phase two begins everything is okay, because then the work starts to dictate its own terms. It starts to get an identity which demands certain future moves. But during the first phase you often find that you come to a full stop. You don't know what to supply. And it's at that stage that I will pull one of the cards out. (as cited in O'Brien, 1978)

There are obvious parallels to parts of the qualitative research process, such as analysis, where a goal precisely may be that "the work" – here, our findings – start to dictate their own terms, get an identity. Thus, one way of working towards this may be to utilize elements that, as this deck of cards does, introduces a degree of randomness at points where the process slows or stops, as a way to "dislocate vision for a while," introduce "unforeseen constellations," "come at the material from a tangent and possibly reassess it." My eighth "rule of engagement" reads:

8. *Systematically transfer properties between cases. Facilitate unforeseen constellations. Seek rupture.*

Go Back to Start

The young man with intellectual disability and his workplace mentor are being interviewed on stage, in front of approximately 700 conference attendees, one of them me. The young man is exercising voice. I am uncomfortably thinking of ways he is being victimized. To the extent that he is not discomfited – and I see no evidence that he is – my normative, critical stance is of course deeply paternalistic. "Discussion of voice," Caldwell notes, "is a fundamental methodological consideration for qualitative researchers working with individuals with ID [intellectual disability] given the extent to which historically their voices have been so pervasively silenced, segregated, and oppressed" (2014, p. 490). Gadamer noted that: "The real power of hermeneutical consciousness is our ability to see what is questionable" (1977, p. 13). The young man is on stage, exercising voice. He may not understand the normative, critical perceptions that his performance is engendering in parts of the audience, namely me. But in my attempt to fill a researcher role, I should probably be more interested in his perspective than in my own, at least at this point. And rather than suspect the situation that unfolds on stage from my perspective, I might try to let the situation suspect my perspective. In a seminal essay, "Of Other Spaces, Heterotopias," Michel Foucault introduced the concept of *heterotopic spaces* – spaces "that have the curious property of being in relation with all the other sites, but in such a way as to suspect, neutralize, or invert the set of relations that they happen to designate, mirror, or reflect" (Foucault, 1984). From such spaces, the mainstream looks different. And because the mainstream looks different, they offer those of us who inhabit the mainstream an "outside perspective." Thus, when the young man described his enjoyment in hosing down emergency exits, perhaps the interviewer truly had a vision of the joys that may come of hosing down emergency exits, and simply shared his vision in a burst of exuberance. The astute researcher would at least consider that people mean exactly what they say. And when the interviewer asked for the young man's opinion of his mentor – did he not also provide him an opportunity to profess his satisfaction before many, to pay a homage that I have no doubt was sincere? Should that opportunity have been taken "off the table" in advance, to avoid a possible embarrassment that never materialized, or to satisfy bureaucratic righteousness? And when we all laughed in the face of the young man's eagerness, of the sheer unstoppable energy

of a new broom under a horizon of new possibility – should it be ruled out that we may simply have shared his joy? No. My final “rule of engagement” is:

9. *Look for the heterotopic possibilities.*

Enhancing Reflexivity: Owren’s Nine

- 1) *Pay sufficient interest to the “uninteresting” cases.*
- 2) *Be respectful of those who are willing to engage with us.*
- 3) *Identify the dilemmas. Look at both sides. Tread carefully.*
- 4) *Prepare questions with care. Make sure they are sufficiently adapted. More important that what sense our questions make to us, is what sense they make to our informants.*
- 5) *Consider if establishing interpretive teams may assist informants in assembling fuller accounts than they are able to provide alone.*
- 6) *Value the upsetting, alien or offensive as unique sources of clues to our own modes of preunderstanding.*
- 7) *Look for tensions, disruptions and conflicts of interest between actors.*
- 8) *Systematically transfer properties between cases. Facilitate unforeseen constellations. Seek rupture.*
- 9) *Look for the heterotopic possibilities.*

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